

Level 3 NVQ Certificate in Business & Administration

Rules of Combination

To achieve a Level 3 Certificate in Business & Administration, you must complete a **minimum of 30 credits**, of which, at **least 20 credits** must be selected from **Level 3 units**:

1. **Thirteen credits** must be completed from **GROUP A MANDATORY UNITS**; and,
2. A **minimum of 11 credits** from **GROUP B OPTIONAL UNITS**, of which:
 - A. Only one unit may be selected from units A/601/2483 or F/601/2484 or T/601/2532 from Group B3: Document Production;
 - B. Either unit T/601/2482 or M/601/2531 may be selected from Group B4: Document Production, but not both;
 - C. Either unit J/601/2485 or A/601/2533 may be selected from Group B4: Document Production, but not both;
 - D. Either unit L/601/2486 or F/601/2534 may be selected from Group B4: Document Production, but not both;
 - E. Either unit L/601/2505 or R/601/2540 may be selected from Group B5: Events and Meetings, but not both;
 - F. Either unit D/601/2508 or Y/601/2541 may be selected from Group B5: Events and Meetings, but not both;
 - G. Either unit Y/601/2510 or H/601/2543 may be selected from Group B5: Events and Meetings, but not both;
 - H. Either unit T/601/2515 or D/601/2542 may be selected from Group B5: Events and Meetings, but not both;
 - I. Either unit K/601/2480 or Y/601/2457 may be selected from Group B7: Customer Services, but not both; and,
 - J. Either unit J/601/2518 or A/601/2564 may be selected from Group B8: Manage Information and Data, but not both;
 - K. Either unit L/601/2536 or T/601/2563 may be selected from Group B8: Manage Information and Data, but not both;
 - L. Either unit A/601/2547 or K/601/2575 may be selected from Group B10: Innovation and Change, but not both; and,
3. A **maximum of 6 credits** from **GROUP C OPTIONAL UNITS**; of which,
 - A. Either Unit F/502/4396 (Bespoke or specialist software) or Unit J/502/4397 (Bespoke or specialist software) may be selected from Group C6: IT, but not both;
 - B. Either Unit F/502/4559 (Data management software) or Unit A/502/4560 (Data management software) may be selected from Group C6: IT, but not both;
 - C. Either Unit M/502/4555 (Database software) or Unit T/502/4556 (Database software) may be selected from Group C6: IT, but not both;
 - D. Either Unit J/502/4156 (Improving productivity using IT) or Unit L/502/4157 (Improving productivity using IT) may be selected from Group C6: IT, but not both;
 - E. Either Unit Y/502/4257 (IT security for users) or Unit D/502/4258 (IT security for users) may be selected from Group C6: IT, but not both;
 - F. Either Unit M/502/4622 (Presentation software) or Unit T/502/4623 (Presentation software) may be selected from Group C6: IT, but not both;
 - G. Either Unit L/502/4210 (Setting up an IT system) or Unit R/502/4211 (Setting up an IT system) may be selected from Group C6: IT, but not both;
 - H. Either Unit F/502/4625 (Spreadsheet software) or Unit J/502/4626 (Spreadsheet software) may be selected from Group C6: IT, but not both;
 - I. Either Unit F/502/4379 (Using collaborative technologies) or Unit T/502/4380 (Using collaborative technologies) may be selected from Unit Group C6: IT, but not both;
 - J. Either Unit R/502/4631 (Website software) or Unit Y/502/4632 (Website software) may be selected from Group C6: IT, but not both; and,
 - K. Either Unit R/502/4628 (Word processing software) or Unit Y/502/4629 (Word processing software) may be selected from Group C6: IT, but not both.

GROUP A: MANDATORY UNITS (13 credits)				
LEVEL	WBA UNIT NO.	UNIT TITLE	CREDITS	GLH
3	L/601/2519	Manage own performance in a business environment	3	12
3	F/601/2520	Evaluate and improve own performance in a business environment	3	22
3	J/601/2521	Work in a business environment	4	21
3	K/601/2527	Communicate in a business environment	3	14
GROUP B: OPTIONAL UNITS (Minimum of 11 credits)				
B1: WORK RESPONSIBILITIES				
3	L/601/2522	Solve business problems	4	18
3	R/601/2523	Work with other people in a business environment	4	12
3	Y/601/2524	Contribute to decision-making in a business environment	3	12
3	D/601/2525	Negotiate in a business environment	5	20
3	H/601/2526	Supervise a team in a business environment	6	52
B2: BUSINESS SUPPORT SERVICES				
3	T/601/2546	Supervise and office facility	5	23
B3: PROJECT MANAGEMENT				
3	J/601/2549	Contribute to running a project	5	30
B4: DOCUMENT PRODUCTION				
2	T/601/2482	Produce documents in a business environment	4	15
2	A/601/2483	Prepare text from notes	3	15
2	F/601/2484	Prepare text from notes using touch typing (40 wpm)	3	15
2	J/601/2485	Prepare text from shorthand (60 wpm)	8	55
2	L/601/2486	Prepare text from recorded audio instruction (40 wpm)	4	35
3	M/601/2531	Design and produce documents in a business environment	4	25
3	T/601/2532	Prepare text from notes using touch typing (60 wpm)	4	10
3	A/601/2533	Prepare text from shorthand (80 wpm)	8	45
3	F/601/2534	Prepare text from recorded audio instruction (60 wpm)	4	25
B5: EVENTS AND MEETINGS				
2	L/601/2505	Support the organisation of an event	2	15
2	D/601/2508	Support the co-ordination of an event	3	20
2	Y/601/2510	Support the organisation of business travel or accommodation	3	18
2	T/601/2515	Support the organisation of meetings	4	18
3	R/601/2540	Plan and organise an event	4	28
3	Y/601/2541	Co-ordinate an event	4	30
3	D/601/2542	Plan and organise meetings	5	25
3	H/601/2543	Organise business travel or accommodation	5	20
3	K/601/2544	Evaluate the organisation of business travel or accommodation	2	10
B6: COMMUNICATIONS				
2	H/601/2476	Use electronic message systems	1	6
2	K/601/2477	Use diary systems	3	9

LEVEL	WBA UNIT NO.	UNIT TITLE	CREDITS	GLH
2	M/601/2478	Take minutes	4	15
3	M/601/2528	Develop a presentation	3	15
3	T/601/2529	Deliver a presentation	3	15
B7: CUSTOMER SERVICE				
2	T/601/2479	Handle mail	3	17
2	K/601/2480	Provide reception services	3	15
2	Y/601/2457	Meet and welcome visitors	3	23
3	A/601/2550	Deliver, monitor and evaluate customer services to internal customers	3	12
3	F/601/2551	Deliver, monitor and evaluate customer services to external customers	3	12
3	D/601/1228	Use customer service as a competitive tool	8	53
3	J/601/1515	Monitor and solve customer service problems	6	40
B8: MANAGE INFORMATION AND DATA				
2	R/601/2487	Organise and report data	3	12
2	Y/601/2488	Research information	4	17
2	R/601/2490	Store and retrieve information	3	17
2	Y/601/2491	Archive information	2	13
2	J/601/2518	Support the management and development of an information system	7	40
3	L/601/2536	Support the design and development of an information system	7	35
3	R/601/2537	Monitor information system	7	30
3	Y/601/2538	Analyse and report data	6	30
4	T/601/2563	Design and develop an information system	7	30
4	A/601/2564	Manage and evaluate an information system	6	20
B9: BUSINESS RESOURCES				
2	H/601/2493	Use office equipment	4	18
2	M/601/2495	Maintain and issue stationery stock items	3	14
3	D/601/2539	Order products and service	5	35
3	J/601/2552	Agree a budget	4	25
B10: INNOVATION AND CHANGE				
2	F/601/2517	Respond to change in a business environment	3	16
3	A/601/2547	Contribute to innovation in a business environment	4	30
4	K/601/2575	Contribute to innovation in a business environment	6	25
4	M/601/2576	Plan change for a team	6	22
B11: SPECIALISED BUSINESS SUPPORT SERVICES – HUMAN RESOURCES				
2	T/601/2790	Administer human resources records	3	20
2	A/601/2791	Administer the recruitment and selection process	3	30
B12: SPECIALISED BUSINESS SUPPORT SERVICES – PARKING				
3	L/601/2648	Administer parking and traffic challenges, representations and civil parking appeals	9	40
3	R/601/2649	Administer statutory parking and traffic appeals	9	45
LEVEL	WBA UNIT	UNIT TITLE	CREDITS	GLH

	NO.			
3	J/601/2650	Administer parking and traffic debt recovery	9	54
2	J/601/2647	Administer parking dispensations	4	14
B13: SPECIALISED BUSINESS SUPPORT SERVICES – EDUCATION				
3	D/601/7787	Provide administrative support in schools	8	53
B14: SPECIALISED BUSINESS SUPPORT SERVICES – LEGAL				
3	H/601/7791	Administer legal files	7	25
3	K/601/7792	Build case files	4	20
3	M/601/7793	Manage case files	5	25
GROUP C: OPTIONAL UNITS (Maximum of 6 credits)				
C1: HEALTH, SAFETY AND SECURITY OF PEOPLE PREMISE AND PROPERTY				
1	T/601/2465	Use occupational and safety guidelines when using keyboards	2	20
C2: IT				
2	F/502/4396	Bespoke software	3	20
2	F/502/4559	Data management software	3	20
2	M502/4555	Database software	4	30
2	J/502/4156	Improving productivity using IT	4	30
2	Y/502/4257	IT security for users	2	15
2	M/502/4622	Presentation software	4	30
2	L/502/4210	Set up an IT system	4	30
2	F/502/4625	Spreadsheet software	4	30
2	F/502/4379	Using collaborative technologies	4	30
2	R/502/4631	Website software	4	30
2	R/502/4628	Word processing software	4	30
3	J/502/4397	Bespoke software	4	30
3	A/502/4560	Data management software	4	30
3	T/502/4556	Database software	6	45
3	L/502/4157	Improving productivity using IT	5	40
3	D/502/4258	IT security for users	3	20
3	T/502/4623	Presentation software	6	45
3	R/502/4211	Set up an IT system	5	40
3	J/502/4626	Spreadsheet software	6	45
3	T/502/4380	Using collaborative technologies	6	45
3	Y/502/4632	Website software	5	40
3	Y/502/4629	Word processing software	6	45
LEVEL	WBA UNIT NO.	UNIT TITLE	CREDITS	GLH
C4: LEADERSHIP AND MANAGEMENT				
4	K/600/9711	Manage physical resources	3	25
4	M/600/9712	Manage the environmental impact of work activities	5	10
4	T/600/9601	Provide leadership and direction for own area of responsibility	5	30
4	M/600/9676	Support learning and development within own area of responsibility	5	25
4	K/600/9661	Develop working relationships with colleagues and stakeholders	4	20

GLH:
Minimum: 126
Maximum: 206

Level 3 NVQ Diploma in Business & Administration

Rule of Combination

To achieve a Level 3 Diploma in Business & Administration, you must complete a **minimum of 40 credits**, of which, **at least 27 credits** must come from **units at Level 3**:

1. **Thirteen credits** must be completed from **GROUP A MANDATORY UNITS**; and,
2. A **minimum of 14 credits** from **GROUP B OPTIONAL UNITS**; of which,
 - A. Only one unit may be selected from units A/601/2483 or F/601/2484 or T/601/2532 from Group B3: Document Production;
 - B. Either unit T/601/2482 or M/601/2531 may be selected from Group B4: Document Production, but not both;
 - C. Either unit J/601/2485 or A/601/2533 may be selected from Group B4: Document Production, but not both;
 - D. Either unit L/601/2486 or F/601/2534 may be selected from Group B4: Document Production, but not both;
 - E. Either unit L/601/2505 or R/601/2540 may be selected from Group B5: Events and Meetings, but not both;
 - F. Either unit D/601/2508 or Y/601/2541 may be selected from Group B5: Events and Meetings, but not both;
 - G. Either unit Y/601/2510 or H/601/2543 may be selected from Group B5: Events and Meetings, but not both;
 - H. Either unit T/601/2515 or D/601/2542 may be selected from Group B5: Events and Meetings, but not both;
 - I. Either unit K/601/2480 or Y/601/2457 may be selected from Group B7: Customer Services, but not both; and,
 - J. Either unit J/601/2518 or A/601/2564 may be selected from Group B8: Manage Information and Data, but not both; and,
 - K. Either unit L/601/2536 or T/601/2563 may be selected from Group B8: Manage Information and Data, but not both;
 - L. Either unit A/601/2547 or K/601/2575 may be selected from Group B10: Innovation and Change, but not both; and,
3. A **maximum of 13 credits** from **GROUP C OPTIONAL UNITS**; of which,
 - A. Either Unit F/502/4396 (Bespoke or specialist software) or Unit J/502/4397 (Bespoke or specialist software) may be selected from Group C6: IT, but not both;
 - B. Either Unit F/502/4559 (Data management software) or Unit A/502/4560 (Data management software) may be selected from Group C6: IT, but not both;
 - C. Either Unit M/502/4555 (Database software) or Unit T/502/4556 (Database software) may be selected from Group C6: IT, but not both;
 - D. Either Unit J/502/4156 (Improving productivity using IT) or Unit L/502/4157 (Improving productivity using IT) may be selected from Group C6: IT, but not both;
 - E. Either Unit Y/502/4257 (IT security for users) or Unit D/502/4258 (IT security for users) may be selected from Group C6: IT, but not both;
 - F. Either Unit M/502/4622 (Presentation software) or Unit T/502/4623 (Presentation software) may be selected from Group C6: IT, but not both;
 - G. Either Unit L/502/4210 (Setting up an IT system) or Unit R/502/4211 (Setting up an IT system) may be selected from Group C6: IT, but not both;
 - H. Either Unit F/502/4625 (Spreadsheet software) or Unit J/502/4626 (Spreadsheet software) may be selected from Group C6: IT, but not both;
 - I. Either Unit F/502/4379 (Using collaborative technologies) or Unit T/502/4380 (Using collaborative technologies) may be selected from Unit Group C6: IT, but not both;
 - J. Either Unit R/502/4631 (Website software) or Unit Y/502/4632 (Website software) may be selected from Group C6: IT, but not both; and,

- K. Either Unit R/502/4628 (Word processing software) or Unit Y/502/4629 (Word processing software) may be selected from Group C6: IT, but not both.

GROUP A: MANDATORY UNITS (13 credits)				
LEVEL	WBA UNIT NO.	UNIT TITLE	CREDITS	GLH
3	L/601/2519	Manage own performance in a business environment	3	12
3	F/601/2520	Evaluate and improve own performance in a business environment	3	22
3	J/601/2521	Work in a business environment	4	21
3	K/601/2527	Communicate in a business environment	3	14
GROUP B: OPTIONAL UNITS (Minimum of 14 credits)				
B1: WORK RESPONSIBILITIES				
3	L/601/2522	Solve business problems	4	18
3	R/601/2523	Work with other people in a business environment	4	12
3	Y/601/2524	Contribute to decision-making in a business environment	3	12
3	D/601/2525	Negotiate in a business environment	5	20
3	H/601/2526	Supervise a team in a business environment	6	52
B2: BUSINESS SUPPORT SERVICES				
3	T/601/2546	Supervise and office facility	5	23
B3: PROJECT MANAGEMENT				
3	J/601/2549	Contribute to running a project	5	30
B4: DOCUMENT PRODUCTION				
2	T/601/2482	Produce documents in a business environment	4	15
2	A/601/2483	Prepare text from notes	3	15
2	F/601/2484	Prepare text from notes using touch typing (40 wpm)	3	15
2	J/601/2485	Prepare text from shorthand (60 wpm)	8	55
2	L/601/2486	Prepare text from recorded audio instruction (40 wpm)	4	35
3	M/601/2531	Design and produce documents in a business environment	4	25
3	T/601/2532	Prepare text from notes using touch typing (60 wpm)	4	10
3	A/601/2533	Prepare text from shorthand (80 wpm)	8	45
3	F/601/2534	Prepare text from recorded audio instruction (60 wpm)	4	25
B5: EVENTS AND MEETINGS				
2	L/601/2505	Support the organisation of an event	2	15
2	D/601/2508	Support the co-ordination of an event	3	20
2	Y/601/2510	Support the organisation of business travel or accommodation	3	18
2	T/601/2515	Support the organisation of meetings	4	18
3	R/601/2540	Plan and organise an event	4	28
3	Y/601/2541	Co-ordinate an event	4	30
3	D/601/2542	Plan and organise meetings	5	25
3	H/601/2543	Organise business travel or accommodation	5	20
3	K/601/2544	Evaluate the organisation of business travel or accommodation	2	10
B6: COMMUNICATIONS				
2	H/601/2476	Use electronic message systems	1	6
2	K/601/2477	Use diary systems	3	9

2	M/601/2478	Take minutes	4	15
LEVEL	WBA UNIT NO.	UNIT TITLE	CREDITS	GLH
3	M/601/2528	Develop a presentation	3	15
3	T/601/2529	Deliver a presentation	3	15
B7: CUSTOMER SERVICE				
2	T/601/2479	Handle mail	3	17
2	K/601/2480	Provide reception services	3	15
2	Y/601/2457	Meet and welcome visitors	3	23
3	A/601/2550	Deliver, monitor and evaluate customer services to internal customers	3	12
3	F/601/2551	Deliver, monitor and evaluate customer services to external customers	3	12
3	D/601/1228	Use customer service as a competitive tool	8	53
3	J/601/1515	Monitor and solve customer service problems	6	40
B8: MANAGE INFORMATION AND DATA				
2	R/601/2487	Organise and report data	3	12
2	Y/601/2488	Research information	4	17
2	R/601/2490	Store and retrieve information	3	17
2	Y/601/2491	Archive information	2	13
2	J/601/2518	Support the management and development of an information system	7	40
3	L/601/2536	Support the design and development of an information system	7	35
3	R/601/2537	Monitor information system	7	30
3	Y/601/2538	Analyse and report data	6	30
4	T/601/2563	Design and develop an information system	7	30
4	A/601/2564	Manage and evaluate an information system	6	20
B9: BUSINESS RESOURCES				
2	H/601/2493	Use office equipment	4	18
2	M/601/2495	Maintain and issue stationery stock items	3	14
3	D/601/2539	Order products and service	5	35
3	J/601/2552	Agree a budget	4	25
4	T/601/2580	Manage budgets	5	29
B10: INNOVATION AND CHANGE				
2	F/601/2517	Respond to change in a business environment	3	16
3	A/601/2547	Contribute to innovation in a business environment	4	30
4	K/601/2575	Contribute to innovation in a business environment	6	25
4	M/601/2576	Plan change for a team	6	22
B11: SPECIALISED BUSINESS SUPPORT SERVICES – HUMAN RESOURCES				
2	T/601/2790	Administer human resources records	3	20
2	A/601/2791	Administer the recruitment and selection process	3	30
B12: SPECIALISED BUSINESS SUPPORT SERVICES – PARKING				
3	L/601/2648	Administer parking and traffic challenges, representations and civil parking appeals	9	40
3	R/601/2649	Administer statutory parking and traffic appeals	9	45

LEVEL	WBA UNIT NO.	UNIT TITLE	CREDITS	GLH
3	J/601/2650	Administer parking and traffic debt recovery	9	54
2	J/601/2647	Administer parking dispensations	4	14
B13: SPECIALISED BUSINESS SUPPORT SERVICES – EDUCATION				
3	D/601/7787	Provide administrative support in schools	8	53
B14: SPECIALISED BUSINESS SUPPORT SERVICES – LEGAL				
3	H/601/7791	Administer legal files	7	25
3	K/601/7792	Build case files	4	20
3	M/601/7793	Manage case files	5	25
GROUP C: OPTIONAL UNITS (Maximum of 13 credits)				
C1: HEALTH, SAFETY AND SECURITY OF PEOPLE PREMISE AND PROPERTY				
1	T/601/2465	Use occupational and safety guidelines when using keyboards	2	20
C2: IT				
2	F/502/4396	Bespoke software	3	20
2	F/502/4559	Data management software	3	20
2	M502/4555	Database software	4	30
2	J/502/4156	Improving productivity using IT	4	30
2	Y/502/4257	IT security for users	2	15
2	M/502/4622	Presentation software	4	30
2	L/502/4210	Set up an IT system	4	30
2	F/502/4625	Spreadsheet software	4	30
2	F/502/4379	Using collaborative technologies	4	30
2	R/502/4631	Website software	4	30
2	R/502/4628	Word processing software	4	30
3	J/502/4397	Bespoke software	4	30
3	A/502/4560	Data management software	4	30
3	T/502/4556	Database software	6	45
3	L/502/4157	Improving productivity using IT	5	40
3	D/502/4258	IT security for users	3	20
3	T/502/4623	Presentation software	6	45
3	R/502/4211	Set up an IT system	5	40
3	J/502/4626	Spreadsheet software	6	45
3	T/502/4380	Using collaborative technologies	6	45
3	Y/502/4632	Website software	5	40
3	Y/502/4629	Word processing software	6	45
2	K/600/8770	Maintaining control accounts	1	4
C4: LEADERSHIP AND MANAGEMENT				
4	K/600/9711	Manage physical resources	3	25
4	M/600/9712	Manage the environmental impact of work activities	5	10
4	T/600/9601	Provide leadership and direction for own area of responsibility	5	30

LEVEL	WBA UNIT NO.	UNIT TITLE	CREDITS	GLH
4	M/600/9676	Support learning and development within own area of responsibility	5	25
4	K/600/9661	Develop working relationships with colleagues and stakeholders	4	20

GLH:

Minimum: 180

Maximum: 297

Mandatory Units

Title	Manage own performance in a business environment	
CfA Unit No.	Q301	
WBA Unit No.	L/601/2519	
Level	3	
Credit Value	3	
GLH	12	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to plan and prioritise work and be accountable to others	1.1 Explain the purpose and benefits of planning work, and being accountable to others for own work 1.2 Explain the purpose and benefits of negotiating realistic targets for work and ways of doing so 1.3 Describe ways of prioritising targets and setting timescales for own work 1.4 Describe the types of problems that may occur during work, and ways of dealing with them 1.5 Explain the purpose and benefits of keeping other people informed about progress 1.6 Explain the purpose and benefits of letting other people know in good time if work plans need to be changed 1.7 Explain the purpose and benefits of recognising and learning from mistakes 1.8 Explain the purpose of guidelines, procedures and codes of practice that are relevant to own work	
2. Understand how to behave in a way that supports effective working	2.1 Explain the purpose and benefits of setting high standards for own work 2.2 Describe ways of setting high standards for own work 2.3 Describe ways of dealing with pressure arising from work tasks	

	<p>2.4 Explain the purpose and benefits of accepting setbacks and dealing with them</p> <p>2.5 Explain the purpose and benefits of being assertive and its meaning in work tasks</p> <p>2.6 Give examples of work situations where it is necessary to be assertive</p> <p>2.7 Explain the purpose and benefits of being ready to take on new challenges and adapt to change</p> <p>2.8 Explain the purpose and benefits of treating others with honesty, respect and consideration</p> <p>2.9 Describe types of behaviour at work that show honesty, respect and consideration and those that do not</p> <p>2.10 Explain the purpose of helping and supporting others at work, and the purpose and benefits of doing so</p>
<p>3. Be able to plan, prioritise and be accountable for own work</p>	<p>3.1 Negotiate and agree realistic targets and achievable timescales for own work</p> <p>3.2 Prioritise targets for own work</p> <p>3.3 Plan work tasks to make best use of own time, effective working methods and available resources</p> <p>3.4 Identify and deal with problems occurring in own work, using the support of other people if necessary</p> <p>3.5 Keep other people informed of progress</p> <p>3.6 Complete work tasks to agreed deadlines or re-negotiate timescales and plans in good time</p> <p>3.7 Take responsibility for own work and accept responsibility for any mistakes made</p> <p>3.8 Evaluate results of mistakes made and make changes to work and methods, as required</p>

	3.9 Follow agreed work guidelines, procedures and, where needed, codes of practice
4. Behave in a way that supports effective working	<p>4.1 Set high standards for own work and demonstrate drive and commitment in achieving these standards</p> <p>4.2 Adapt work and working methods to deal with setbacks and difficulties</p> <p>4.3 Use own needs and rights when necessary to achieve work tasks and priorities</p> <p>4.4 Look to engage with opportunities, and agree to take on new challenge(s)</p> <p>4.5 Look for opportunities, and change ways of working, to meet new requirements</p> <p>4.6 Treat other people with honesty respect and consideration</p> <p>4.7 Help and support other people in work tasks</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about taking responsibility for managing, prioritising and being accountable for your own work in a business environment.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	12

Title	Evaluate and improve own performance in a business environment	
CfA Unit No.	Q302	
WBA Unit No.	F/601/2520	
Level	3	
Credit Value	3	
GLH	22	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to evaluate and improve own performance	1.1 Explain the purpose and benefits of continuously improving own performance in a business environment 1.2 Explain the purpose and value of encouraging and accepting feedback from others 1.3 Describe ways of evaluating own work 1.4 Explain the purpose and benefits of trying out possible improvements to own work 1.5 Evaluate how learning and development can improve own work, benefit organisations, and further own career 1.6 Compare possible career progression routes 1.7 Describe possible development opportunities 1.8 Justify the value of developing a learning plan	
2. Be able to evaluate and improve own performance using feedback from others	2.1 Encourage and accept feedback from other people 2.2 Evaluate own work and use feedback from others to identify areas for improvement 2.3 Identify changes in ways of working needed to improve work performance 2.4 Complete work tasks using changed ways of working 2.5 Evaluate work completed and	

	changed ways of working for improvements and effectiveness
3. Be able to use evaluation of own performance to agree, develop and use a learning plan	<p>3.1 Evaluate own performance and identify where further learning and development will improve own work</p> <p>3.2 Agree and develop a learning plan to improve own work performance, that meets own needs</p> <p>3.3 Follow a learning plan for improvement to own work</p> <p>3.4 Review progress against learning plan and make updates for improving own work and further learning</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about evaluating and improving your own performance in the workplace.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	22

Title	Work in a business environment	
CfA Unit No.	Q303	
WBA Unit No.	J/601/2521	
Level	3	
Credit Value	4	
GLH	21	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose and benefits of respecting and supporting other people at work	1.1 Explain the purpose of supporting other people at work 1.2 Explain the purpose of helping other people to work effectively and efficiently a) for individuals b) for organisations 1.3 Explain what is meant by diversity and why it should be valued 1.4 Outline the benefits of diversity to an organisation 1.5 Explain how to treat other people in a way that is sensitive to their needs 1.6 Explain how to treat other people in a way that respects their abilities, background, values, customs and beliefs 1.7 Describe ways in which it possible to learn from others at work	
2. Understand how to maintain security and confidentiality at work and deal with concerns	2.1 Outline the purpose and benefits of maintaining security and confidentiality at work 2.2 Outline requirements for security and confidentiality in an organisation 2.3 Outline legal requirements for security and confidentiality, as required 2.4 Describe procedures for dealing with concerns about security and confidentiality in an organisation	
3. Understand how to assess,	3.1 Describe sources of risk in an	

manage and monitor risk in the workplace	<p>organisation, including health and safety</p> <p>3.2 Explain how to assess and monitor risks in an organisation</p> <p>3.3 Describe ways of minimising risk in an organisation</p>
4. Understand the purpose of keeping waste to a minimum in a business environment, and the procedures to follow	<p>4.1 Describe the purpose and benefits of keeping workplace waste to a minimum</p> <p>4.2 Describe the main causes of waste that may occur in a business environment</p> <p>4.3 Describe ways of minimising waste, including using technology and other procedures</p> <p>4.4 Explain the purpose and benefits of recycling</p> <p>4.5 Describe organisational procedures for recycling materials, and their purpose</p> <p>4.6 Describe ways in which waste may be minimised by regularly maintaining equipment</p>
5. Understand procedures for disposal of hazardous materials	<p>5.1 Explain the purpose of procedures for the recycling and disposal of hazardous materials</p> <p>5.2 Describe procedures for the recycling and disposal of hazardous materials for an organisation</p>
6. Understand ways of supporting sustainability in an organisation	<p>6.1 Explain the benefits to an organisation of improving efficiency and minimising waste over time</p> <p>6.2 Describe ways of continuously improving own working methods and use of technology to achieve maximum efficiency and minimum waste</p> <p>6.3 Outline ways of selecting sources of materials and equipment that give best value for money</p>
7. Be able to respect and support other people at work in an organisation	<p>7.1 Complete work tasks with other people in a way that shows respect for</p>

	<ul style="list-style-type: none"> a) backgrounds b) abilities c) values, customs and beliefs <p>7.2 Complete work tasks with other people in a way that is sensitive to their needs</p> <p>7.3 Use feedback and guidance from other people to improve own way of working</p> <p>7.4 Follow organisational procedures and legal requirements in relation to discrimination legislation in own work</p>
8. Be able maintain security and confidentiality	<p>8.1 Keep property secure, following organisational procedures and legal requirements, as required</p> <p>8.2 Keep information secure and confidential, following organisational procedures and legal requirements</p> <p>8.3 Follow organisational procedures to report concerns about security / confidentiality to an appropriate person or agency, as required</p>
9. Be able to assess, manage and monitor risk	<p>9.1 Identify and agree possible sources of risk in own work</p> <p>9.2 Identify and agree new risks in own work, as required</p> <p>9.3 Assess and confirm the level of risk</p> <p>9.4 Identify and agree ways of minimising risk in own work</p> <p>9.5 Monitor risk in own work</p> <p>9.6 Use outcomes of assessing and dealing with risk to make recommendations, as required</p>
10. Be able to support the minimisation of waste in an organisation	<p>10.1 Complete work tasks keeping waste to a minimum</p> <p>10.2 Use technology in own work tasks in ways that minimise waste</p>
11. Be able to follow procedures for the disposal of hazardous waste in an organisation	<p>11.1 Follow procedures for recycling and disposal of hazardous materials in own work tasks, as</p>

	required
12. Be able to support sustainability in an organisation	<p>12.1 Follow procedures for the maintenance of equipment in own work</p> <p>12.2 Review own ways of working, including use of technology, and make suggestions for improving efficiency</p> <p>12.3 Select and use equipment and materials in own work in ways that give best value for money</p> <p>12.4 Support other people in ways that maximises their effectiveness and efficiency</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about being able to behave and make positive contributions to work tasks and procedures, in a business environment, in ways that support diversity, reduction of waste and improve efficiency, show respect for property and security, and which minimise risk.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	21

Title	Communicate in a business environment	
CfA Unit No.	Q309	
WBA Unit No.	K/601/2527	
Level	3	
Credit Value	3	
GLH	14	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose of planning communication	1.1 Explain the benefits of knowing the purpose of communication 1.2 Explain the reasons for knowing the audience to whom communications are presented 1.3 Explain the purpose of knowing the intended outcomes of communications 1.4 Describe different methods of communication and when to use them	
2. Understand how to communicate in writing	2.1 Identify relevant sources of information that may be used when preparing written communication 2.2 Explain the communication principles for using electronic forms of written communication in a business environment 2.3 Explain different styles and tones of language and situations when they may be used for written communications 2.4 Explain the reasons for selecting and using language that suits the purpose of written communication 2.5 Describe ways of organising, structuring and presenting written information so it meets the needs of different audiences 2.6 Describe ways of checking written information for accuracy of content 2.7 Explain the purpose of accurate use of grammar, punctuation and	

	<p>spelling in written communication</p> <p>2.8 Explain what is meant by plain English, and why it is used</p> <p>2.9 Explain the purpose of proofreading and checking work</p> <p>2.10 Explain the purpose of recognising work that is 'important' and work that is 'urgent'</p> <p>2.11 Describe organisational procedures for saving and filing written communications</p>
3. Understand how to communicate verbally	<p>3.1 Describe ways of verbally presenting information and ideas clearly</p> <p>3.2 Explain ways of making contributions to discussions that help to achieve objectives</p> <p>3.3 Describe ways of adapting verbal contributions to suit different audiences, purposes and situations</p> <p>3.4 Describe how to use and interpret body language</p> <p>3.5 Describe how to use and interpret tone of voice</p> <p>3.6 Describe methods of active listening</p> <p>3.7 Describe the benefits of active listening</p> <p>3.8 Explain the purpose of summarising verbal communication</p>
4. Understand the purpose and value of feedback in developing communication skills	<p>4.1 Describe ways of getting feedback on whether communications achieved their purpose</p> <p>4.2 Explain the purpose and benefits of using feedback to further develop communication skills</p>
5. Be able to plan communication	<p>5.1 Identify the purpose of communications and the audience(s)</p> <p>5.2 Select methods of communication to be used</p>

	5.3 Confirm methods of communication, as required
6. Be able to communicate in writing	<p>6.1 Find and select information that supports the purpose of written communications</p> <p>6.2 Present information using a format, layout, style and house style suited to the purpose and method of written communications</p> <p>6.3 Use language that meets the purpose of written communications and the needs of the audience</p> <p>6.4 Organise structure and present written information so that it is clear and accurate, and meets the need of different audiences</p> <p>6.5 Use accurate grammar, spelling and punctuation, and plain English to make sure that meaning of written communication is clear</p> <p>6.6 Proofread and check written communications and make amendments, as required</p> <p>6.7 Confirm what is 'important' and what is 'urgent'</p> <p>6.8 Produce written communications to meet agreed deadlines</p> <p>6.9 Keep a file copy of written communications sent</p>
7. Be able to communicate verbally	<p>7.1 Verbally present information and ideas to others clearly and accurately</p> <p>7.2 Make verbal contributions to discussion(s) that suit the audience, purpose and situation</p> <p>7.3 Use body language and tone to meet the needs of the audience, purpose and situation</p> <p>7.4 Actively listen to information given by other people, and make relevant verbal responses</p> <p>7.5 Ask relevant verbal questions to</p>

	clarify own understanding, as required 7.6 Summarise verbal communication(s) and make sure that the correct meaning has been understood
8. Be able to identify and agree ways of further developing communication skills	8.1 Get feedback to confirm whether communication has achieved its purpose 8.2 Use feedback to identify and agree ways of further developing own communication skills

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about being able to select and use information and different styles of communication, in order to communicate clearly, accurately and effectively, in writing and verbally, with other people in a business environment.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	14

Optional Units

Work Responsibilities

Title	Solve business problems
CfA Unit No.	Q304
WBA Unit No.	L/601/2522
Level	3
Credit Value	4
GLH	18
Learning Outcomes	Assessment Criteria
The learner will	The learner can
1. Understand business problems and their causes	1.1 Describe ways of recognising when a business problem exists 1.2 Explain how to identify possible causes of business problems 1.3 Describe ways of analysing business problems
2. Understand techniques for solving business problems	2.1 Describe different ways of planning to solve a business problem 2.2 Describe different ways of solving business problems 2.3 Give reasons for having support and feedback from others when problem solving 2.4 Explain the purpose of regularly reviewing progress and adjusting plans during problem solving 2.5 Describe ways of recognising when a problem has been solved
3. Understand factors that influence solutions to business problems	3.1 Describe the possible effects of organisational policies and procedures when solving business problems 3.2 Describe the possible effects of legal or regulatory requirements when solving business problems
4. Understand how to evaluate approaches to solving business problems	4.1 Describe ways of evaluating approaches to solving business problems 4.2 Describe ways of evaluating

	solutions to problems for effectiveness
5. Be able to recognise and analyse business problems	<p>5.1 Recognise a business problem</p> <p>5.2 Confirm own understanding of a business problem</p> <p>5.3 Identify reasons for a business problem</p> <p>5.4 Analyse a business problem, getting additional information, as required</p> <p>5.5 Work with others to agree what the business problem is</p>
6. Be able to plan and carry out own solution to the business problem	<p>6.1 Develop and justify an approach for how to solve the business problem</p> <p>6.2 Develop own plan to solve the business problem</p> <p>6.3 Identify ways of deciding when the problem has been solved</p> <p>6.4 Agree own plan, with others as required</p> <p>6.5 Carry out own plan to solve the business problem, involving others as required</p> <p>6.6 Use support and feedback from others to help reach a solution</p> <p>6.7 Regularly check progress towards solving the business problem</p> <p>6.8 Use feedback and progress reports to adjust the plan, as required</p> <p>6.9 Confirm that the problem has been solved, with others as required</p>
7. Be able to evaluate own solution to the business problem	<p>7.1 Evaluate own approach to solving the business problem for its effectiveness</p> <p>7.2 Evaluate own solution to the business problem for its effectiveness</p> <p>7.3 Evaluate alternative approaches and solutions for possible effectiveness</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about recognising that there is a problem with the way work is being carried out in a business environment and analysing the problem for possible causes.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	18

Title	Work with other people in a business environment	
CfA Unit No.	Q305	
WBA Unit No.	R/601/2523	
Level	3	
Credit Value	4	
GLH	12	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to support an organisation's overall mission and purpose	1.1 Explain how the organisation works 1.2 Explain the organisation's mission and purpose 1.3 Compare how the organisation works with other different types of organisations 1.4 Explain your main responsibilities, how these fit into the organisation's structure, and how these contribute to achieving your organisation's mission 1.5 Define policies, procedures, systems and values of your organisation relevant to your role 1.6 Describe when it is appropriate to seek guidance from others when unsure about objectives, policies, systems procedures and values	
2. Understand how to work as a team to achieve goals and objectives	2.1 Explain the purpose and benefits of working with other people to achieve agreed goals and objectives 2.2 Describe situations in which working with others can achieve positive results 2.3 Explain the purpose and benefits of sharing work goals and plans when working with others 2.4 Describe situations in which team members might need support 2.5 Explain different ways of providing support to teams 2.6 Explain the purpose and benefits of agreeing quality measures	

	within a team
3. Understand how to communicate as a team	<p>3.1 Explain when it is essential to communicate with the people working within a team</p> <p>3.2 Compare and contrast different methods of communication and when to use them</p> <p>3.3 Explain the benefits of effective communication within a team</p>
4. Understand the contribution of individuals within a team	<p>4.1 Explain the purpose and benefits of acknowledging the strengths of others</p> <p>4.2 Explain the purpose and benefits of respecting individuals working within a team</p>
5. Understand how to deal with problems and disagreements	<p>5.1 Explain the types of problems and disagreements that may occur when working with others</p> <p>5.2 Evaluate ways of resolving problems and disagreements when working with others</p>
6. Understand the purpose of feedback when working as a team	<p>6.1 Explain the purpose and benefits of giving and receiving constructive feedback</p> <p>6.2 Explain ways of using feedback to improve individual work, the work of others and a team as a whole</p>
7. Be able to work in a team to achieve goals and objectives	<p>7.1 Work in a way that supports your organisation's overall mission</p> <p>7.2 Follow policies, systems and procedures relevant to your job</p> <p>7.3 Contribute to improving objectives, policies, systems, procedures and values in a way that is consistent with your role</p> <p>7.4 Put your organisation's values into practice in all aspects of your work</p> <p>7.5 Seek guidance from others when not sure about objectives, policies, systems, procedures and values</p> <p>7.6 Communicate effectively with</p>

	<p>other people in a team</p> <p>7.7 Share work goals, priorities and responsibilities with a team</p> <p>7.8 Agree work objectives and quality measures with a team, to achieve a positive outcome</p> <p>7.9 Make sure work goals and objectives are achieved in a way makes best use of all abilities in a team</p> <p>7.10 Provide support to members of a team, as required</p> <p>7.11 Show respect for individuals in a team</p> <p>7.12 Make sure the team produces quality work on time</p>
8. Be able to deal with problems in a team	<p>8.1 Identify problem(s) or disagreement(s) in a team</p> <p>8.2 Resolve problem(s) or disagreement(s), referring if required</p>
9. Be able to share feedback on objectives in a team	<p>9.1 Share constructive feedback on achievement of objectives with a team</p> <p>9.2 Receive constructive feedback on own work</p> <p>9.3 Share feedback on achievement of objectives to identify improvements in own work, and that of the team</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about working with other people, in a way that achieves agreed goals and objectives for the organisation and the team.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration

Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	12

Title	Contribute to decision-making in a business environment	
CfA Unit No.	Q306	
WBA Unit No.	Y/601/2524	
Level	3	
Credit Value	3	
GLH	12	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose and process of decision-making	1.1 Identify situations where decision-making is required 1.2 Explain key stages in the decision-making process	
2. Understand how to prepare to contribute to decision-making	2.1 Understand the purpose of knowing the context in which a decision is being made 2.2 Describe the role and responsibilities of a person contributing to decision-making 2.3 Describe possible limitations on a person contributing to decision-making 2.4 Identify sources of information that can be used to inform decision-making 2.5 Explain how to research information to be used to inform decision-making	
3. Understand how to contribute to decision-making	3.1 Explain the purpose of contributing to meetings and other discussions where decisions are being made, and ways of doing so 3.2 Explain how to structure own ideas and information 3.3 Explain the purpose and benefits of respecting other people's contributions to the decision-making process 3.4 Explain the purpose of listening and responding to other people during the decision-making process, and ways of doing so	

	<p>3.5 Explain how to use evidence, argument, questioning and assertiveness to influence outcomes</p> <p>3.6 Explain the purpose of collective responsibility</p>
4. Be able to prepare contributions to decision-making	<p>4.1 Identify sources of information needed</p> <p>4.2 Research and collect information to add value to the decision-making process</p>
5. Be able to make contributions to decision-making	<p>5.1 Present information to others and develop ideas, using accurate and current information</p> <p>5.2 Make constructive, relevant and timely contributions to meeting(s) or other discussions to contribute to making a decision</p> <p>5.3 Provide additional information, when asked, to contribute to making a decision</p> <p>5.4 Contribute to identifying and agreeing criteria for making a decision</p> <p>5.5 Contribute to structuring ideas and information in a way that helps other people understand own ideas</p> <p>5.6 Listen to other people's contributions adapting own ideas as necessary</p> <p>5.7 Contribute to reviewing information provided for a decision to be made</p> <p>5.8 Confirm support for an agreed decision</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about contributing to the decision making process made in a business environment.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)

Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	12

Title	Negotiate in a business environment	
CfA Unit No.	Q307	
WBA Unit No.	D/601/2525	
Level	3	
Credit Value	5	
GLH	20	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to prepare for negotiations	1.1 Outline the main principles of negotiations 1.2 Outline the process of negotiation and how it is used in business 1.3 Outline the purpose of different negotiation strategies and techniques 1.4 Explain the value of understanding the roles of other negotiators 1.5 Explain the purpose of knowing limits of own responsibility in negotiations 1.6 Explain the purpose of having clear objectives for negotiations	
2. Understand how to conduct negotiations	2.1 Explain the purpose of being flexible during negotiations while seeking to achieve the main objectives 2.2 Explain the purpose of keeping to the brief during negotiations 2.3 Explain the purpose of keeping to own level of authority during negotiations 2.4 Explain the purpose of referring issues to others, as required 2.5 Explain the purpose of keeping goodwill during negotiations, and ways of doing so 2.6 Explain when it might be necessary to withdraw from negotiations 2.7 Explain how to withdraw from negotiations in a way that	

	maintains goodwill
3. Understand how to complete negotiations	<p>3.1 Explain the purpose of achieving an outcome that meets main objectives</p> <p>3.2 Explain the purpose of keeping an accurate record of negotiations, if required</p>
4. Be able to prepare for negotiation	<p>4.1 Identify objectives to be achieved</p> <p>4.2 Identify potential problems in negotiation(s) and ways of overcoming them</p>
5. Be able to conduct negotiations	<p>5.1 Carry out negotiations within limits of own authority</p> <p>5.2 Make proposals which meet main objectives</p> <p>5.3 Use negotiation strategy to obtain results that meet minimum or agreed outcomes</p> <p>5.4 Clarify other negotiator's understanding, and respond to their queries</p> <p>5.5 Suggest solutions to deal with problems, if required</p> <p>5.6 Refer the negotiation to others, when required</p> <p>5.7 Carry out negotiations in a way that maintains goodwill and promotes a positive image of self and an organisation</p>
6. Be able to complete negotiations	<p>6.1 Reach an agreement to the satisfaction of all those involved in the negotiations, where possible</p> <p>6.2 Maintain records of the negotiations, if required</p> <p>6.3 Complete negotiations in a way that maintains goodwill and promotes a positive image of self and an organisation</p>

Additional Information about the unit

Unit purpose and aim(s)	This unit is about preparing for, and carrying out straightforward negotiations with other parties, in a business environment, in order to reach an agreement on an activity or
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	activities that meets the needs of an organisation.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	20

Title	Supervise a team in a business environment	
CfA Unit No.	Q308	
WBA Unit No.	H/601/2526	
Level	3	
Credit Value	6	
GLH	52	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose and benefits of team work	1.1 Explain the purpose and benefits of working with other people to achieve agreed goals and objectives 1.2 Describe situations in which supervision of others can achieve positive outcomes	
2. Understand the purpose of communication in teams, and how to do so	2.1 Explain the purpose and benefits of different methods of communication with and within teams, and when to use them 2.2 Explain when it is essential to communicate with others in a team	
3. Understand the purpose of planning work with teams, and how to do so	3.1 Describe the purpose and benefits of agreeing work goals and plans with a team, and how to do so 3.2 Explain how to schedule activities and resources for a team 3.3 Explain the purpose and benefits of agreeing quality measures and timescales with a team, and how to do so	
4. Understand the value of people in a team and how to respect and support them	4.1 Explain the purpose and benefits of recognising the strengths of individuals in a team and of balancing abilities in a team 4.2 Describe ways of giving work to teams so the best use is made of strengths and abilities 4.3 Explain the benefits of diversity in teams 4.4 Explain the purpose and benefits of respecting others 4.5 Describe situations in which team	

	<p>members might need support and how to provide this</p> <p>4.6 Describe the types of problems and disagreements that may occur when working with a team and how to resolve them</p>
<p>5. Understand the purpose and benefits of assessing and evaluating the work of a team and how to do so</p>	<p>5.1 Describe the purpose of work assessment</p> <p>5.2 Explain how to assess the work of teams and team members</p> <p>5.3 Explain the purpose and benefits of giving opportunities to team members to assess their own work</p> <p>5.4 Explain the purpose and benefits of giving and receiving constructive feedback, and how to do so</p> <p>5.5 Explain how to make use of feedback to improve the work of others and the work of the team as a whole</p>
<p>6. Be able to supervise a team</p>	<p>6.1 Communicate with people in a team during work activities</p> <p>6.2 Supervise work goals and plan work objectives, priorities and responsibilities for a team and individuals</p> <p>6.3 Identify, agree and supervise opportunities for others to work to achieve agreed outcomes</p> <p>6.4 Schedule activities and resources</p> <p>6.5 Allocate work tasks and supervise best use of abilities within a team</p> <p>6.6 Agree quality measures and timescales for a team</p> <p>6.7 Provide support to members of a team, as required</p> <p>6.8 Show respect for individuals in a team</p> <p>6.9 Supervise production of work to agreed quality standards and timescales</p> <p>6.10 Identify and solve problems and disagreements, or refer if</p>

	necessary
7. Be able to assess, evaluate and improve the work of a team	<p>7.1 Assess and evaluate the work of a team and individuals to identify strengths and areas for improvement</p> <p>7.2 Make sure team members have opportunities to assess their own work for strengths and areas for improvement</p> <p>7.3 Share feedback, and outcomes of assessing work with individuals and a team</p> <p>7.4 Make and agree suggestions for improving the work of individuals and a team</p> <p>7.5 Make sure individuals and a team are encouraged to improve work as an outcome of assessing work</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about supervising the work of a team in a business environment to make sure that work is planned, carried out, supervised and monitored and evaluated for possible improvements in ways of working individually and as a team.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	52

Title	Supervise an office facility	
CfA Unit No.	Q325	
WBA Unit No.	T/601/2546	
Level	3	
Credit Value	5	
GLH	23	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to provide, maintain and supervise an office facility that meets the needs of its users	1.1 Explain the purpose and benefits of providing and maintaining an office facility that meets the needs of its users in line with agreed budgets 1.2 Describe a range of facilities, equipment and resources for an office, and what they can be used for 1.3 Explain the purpose and benefits of identifying and regularly reviewing the needs of office users and ways of doing so 1.4 Explain the purpose of having office systems and procedures 1.5 Describe systems and procedures for an office within own area of responsibility 1.6 Explain the purpose and benefits of building relationships with suppliers and ways of doing so 1.7 Explain the purpose of giving users information, guidance and support for following office systems and procedures, and for using facilities and equipment 1.8 Explain the purpose and benefits of monitoring office facilities and identify the types of activities to monitor	
2. Understand how to deal with repairs and problems when supervising office facilities and equipment	2.1 Explain how to identify repairs needed to the facilities and equipment of an office 2.2 Describe procedures for dealing with repairs needed	

	<p>2.3 Explain the types of problems that arise with the use and supervision of office facilities and equipment, and how to deal with them</p>
<p>3. Understand the purpose of health, safety and security requirements in an office</p>	<p>3.1 Explain why health, safety and security are important in an office environment</p> <p>3.2 Describe the main health, safety and security requirements that are important in an office environment</p> <p>3.3 Identify health, safety and security requirements for an office, including its facilities and equipment</p>
<p>4. Be able to supervise an office facility</p>	<p>4.1 Identify, agree and provide facilities and equipment for an office to meet the needs of users, in line with agreed budgets</p> <p>4.2 Maintain facilities and equipment for an office to meet the needs of users</p> <p>4.3 Supervise and monitor use of facilities and equipment for an office</p> <p>4.4 Use and review the facilities, systems and procedures of an office, reporting changes in requirements, as needed</p> <p>4.5 Make sure the equipment in an office is working correctly</p> <p>4.6 Identify repairs needed to the facilities and equipment in an office and deal with or refer, as required</p> <p>4.7 Maintain relationships with suppliers and look for opportunities to develop relationships</p> <p>4.8 Make contributions to the review of an office environment in line with health, safety and security policy</p> <p>4.9 Deal with problems with facilities and equipment in an office, or</p>

	<p>refer as required</p> <p>4.10 Provide information and guidance to users on the facilities and equipment in an office</p> <p>4.11 Explain priorities for the supply, maintenance and use of office facilities and equipment to users, as required</p> <p>4.12 Monitor the use of office facilities</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about supervising an office facility to make sure that the systems and procedures, facilities and equipment needed for the smooth running of the office are in place, and reviewing use for possible changes and new needs. It is also about maintaining and supervising the use of facilities and equipment, following health, safety and security procedures, making arrangements for repairs as needed, and giving advice and guidance to users.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	23

Project Management

Title	Contribute to running a project	
CfA Unit No.	Q327	
WBA Unit No.	J/601/2549	
Level	3	
Credit Value	5	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to contribute to agree to a project brief	1.1 Describe the difference between routine work and taking part in a project 1.2 Explain the advantages and disadvantages of using projects and when projects are appropriate 1.3 Explain the project-planning methodologies appropriate to the types of projects run and the tools that can be used to assist project planning and control 1.4 Explain the purpose and benefits of identifying stakeholders involved in the project 1.5 Explain the purpose of contributing to agreeing a project's purpose, scope, timescale, costs, aims and objectives 1.6 Explain the purpose of agreeing a budget for a project 1.7 Describe how to estimate types and quantity of resources needed to run a project 1.8 Describe how to identify project risks and develop contingency plans, if required	
2. Understand how to contribute to a project	2.1 Describe the types of information needed to monitor projects and the methods that can be used to give information 2.2 Describe how to estimate and control resources in an area of work during a project	

	<p>2.3 Explain the purpose of reporting own progress during a project</p> <p>2.4 Outline reasons for seeking advice in response to unexpected events</p> <p>2.5 Explain the purpose and benefits of contributing towards achieving projects within agreed timescales</p> <p>2.6 Explain the purpose and benefits of keeping records of all project activity within the scope of own work</p> <p>2.7 Describe different ways of communicating with those involved in or affected by a project to make sure it runs smoothly</p>
3. Understand the purpose of contributing to the evaluation of a project	<p>3.1 Describe different types of methods available to monitor projects</p> <p>3.2 Explain the purpose of making own contributions when evaluating projects</p> <p>3.3 Describe how to learn lessons for the future for own work</p>
4. Be able to contribute to preparing and planning a project	<p>4.1 Confirm the purpose of the project with all stakeholders</p> <p>4.2 Confirm project scope, timescale, aims and objectives</p> <p>4.3 Contribute to the preparation of a project specification</p> <p>4.4 Confirm all types of resources for all stakeholders</p> <p>4.5 Confirm with all stakeholders, the project plan and timed use of all types of resources for an area of work</p> <p>4.6 Contribute to identifying risks and develop contingency plans for an area of work</p>
5. Be able to contribute to running a project	<p>5.1 Implement a project</p> <p>5.2 Communicate with all stakeholders involved with or affected by a project</p> <p>5.3 Adapt project plans for stakeholders to respond to</p>

	<p>unexpected events and risks</p> <p>5.4 Provide interim reports on project progress to relevant stakeholders</p> <p>5.5 Achieve required outcomes for relevant stakeholders on time and to budget</p> <p>5.6 Seek advice in response to unexpected events, if required</p> <p>5.7 Keep records of project activity</p>
6. Be able to contribute to evaluating the outcomes of a project	<p>6.1 Evaluate project for all stakeholders</p> <p>6.2 Report on the degree to which a project met its aims and objectives for all stakeholders</p> <p>6.3 Report on project strengths and areas for improvement for all stakeholders</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about contributing to achieving project's agreed aims and objectives as it impacts on stakeholders.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	30

Document Production

Title	Produce documents in a business environment
CfA Unit No.	Q212
WBA Unit No.	T/601/2482
Level	2
Credit Value	4
GLH	15
Learning Outcomes	Assessment Criteria
The learner will	The learner can
1. Understand the purpose of producing high quality and attractive documents in a business environment	1.1 Outline different types of documents that may be produced and the different styles that could be used 1.2 Describe different formats in which text may be presented 1.3 Explain the purpose and benefits of producing high quality and attractive documents
2. Know the resources and technology available and how to use them when producing documents in a business environment	2.1 Describe the types of resources available for producing high quality and attractive documents 2.2 Outline ways of using different resources to produce documents 2.3 Describe different types of technology available for inputting, formatting and editing text, and their main features
3. Understand the purpose of following procedures when producing documents in a business environment	3.1 Explain the benefits of agreeing the purpose, content, style, and deadlines for producing documents 3.2 Outline different ways of organising content needed for documents 3.3 Outline ways of integrating and laying out text and non-text 3.4 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so 3.5 Explain the purpose of storing

	<p>documents safely and securely, and ways of doing so</p> <p>3.6 Explain the purpose of confidentiality and data protection when preparing documents</p> <p>3.7 Explain the purpose and benefits of meeting deadlines</p>
4. Be able to prepare for tasks	4.1 Confirm the purpose, content, style and deadlines for documents
5. Be able to produce documents to agreed specifications	<p>5.1 Prepare resources needed to produce documents</p> <p>5.2 Organise the content required to produce documents</p> <p>5.3 Make use of technology, as required</p> <p>5.4 Format and produce documents to an agreed style</p> <p>5.5 Integrate non-text objects into an agreed layout, if required</p> <p>5.6 Check texts for accuracy</p> <p>5.7 Edit and correct texts, as required</p> <p>5.8 Clarify document requirements, when necessary</p> <p>5.9 Store documents safely and securely following organisational procedures</p> <p>5.10 Present documents to the required format and within the agreed deadlines</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about preparing high quality and attractive documents to agreed layouts, formats, styles to meet agreed deadlines.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration

Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	15

Title	Prepare text from notes	
CfA Unit No.	Q213	
WBA Unit No.	A/601/2483	
Level	2	
Credit Value	3	
GLH	15	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand preparing text from notes	1.1 Describe different types of documents that may be produced from notes and the formats to be followed 1.2 Explain the difference between producing text from own notes and producing text from others' notes	
2. Understand the purpose and benefits of following procedures when preparing text from notes	2.1 Explain the benefits of agreeing the purpose, format and deadline for preparing text from notes 2.2 Explain the purpose of accuracy – including spelling, grammar and punctuation – when preparing text from notes 2.3 Describe ways of checking finished documents for accuracy and correctness, and the purpose of doing so 2.4 Explain the purpose of storing text and notes safely and securely, and ways of doing so 2.5 Explain the purpose of confidentiality and data protection when preparing text from notes 2.6 Explain the purpose and benefits of meeting deadlines	
3. Be able to prepare for text from notes	3.1 Agree the purpose, format and deadlines for texts	
4. Be able to prepare text from notes	4.1 Input text using keyboard skills 4.2 Format text to agreed style and layout, making efficient use of available technology 4.3 Clarify text requirements when	

	<p>necessary</p> <p>4.4 Read and check texts for accuracy</p> <p>4.5 Edit and correct texts, as required</p> <p>4.6 Store texts and original notes safely and securely following organisational procedures</p> <p>4.7 Produce texts to the required format and within agreed deadlines</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about preparing different types of text from own notes and notes written by other people to meet agreed timescales.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	15

Title	Prepare text from notes using touch typing (40 wpm)
CfA Unit No.	Q214
WBA Unit No.	F/601/2484
Level	2
Credit Value	3
GLH	15
Learning Outcomes	Assessment Criteria
The learner will	The learner can
1. Understand the task of preparing text from notes using touch typing	<p>1.1 Describe different types of documents that may be produced from notes and the formats to be followed</p> <p>1.2 Describe different forms in which texts may be presented</p> <p>1.3 Explain the difference between producing text from own notes and producing text from others' notes</p>
2. Understand the purpose and benefits of following procedures when preparing text using touch typing	<p>2.1 Explain the value and benefits of agreeing the purpose, format and deadline for delivering text</p> <p>2.2 Explain the purpose of accuracy – including spelling, grammar and punctuation –when preparing text typed from notes</p> <p>2.3 Describe ways of checking finished documents for accuracy and correctness</p> <p>2.4 Explain the purpose of storing text and original notes safely and securely, and ways of doing so</p> <p>2.5 Explain the purpose of confidentiality and data protection when preparing text from notes</p> <p>2.6 Explain the purpose of meeting deadlines</p>
3. Be able to prepare for tasks	3.1 Agree the purpose, format and deadlines for texts
4. Be able to produce texts using touch typing	<p>4.1 Input texts using touch typing to a minimum speed of 40 words per minute</p> <p>4.2 Format texts to agreed style and layout making efficient use of</p>

	<p>available technology</p> <p>4.3 Clarify text requirements when necessary</p> <p>4.4 Read and check texts for accuracy</p> <p>4.5 Edit and correct texts, as required</p> <p>4.6 Store texts and original notes safely and securely following organisational procedures</p> <p>4.7 Present texts to the required format, within the agreed deadlines</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about preparing different types of text using touch typing at a minimum speed of 40 words per minute.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	15

Title	Prepare text from shorthand (60 wpm)	
CfA Unit No.	Q215	
WBA Unit No.	J/601/2485	
Level	2	
Credit Value	8	
GLH	55	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the task of preparing text from shorthand	1.1 Describe different types of documents that may be produced from shorthand and the formats to be followed 1.2 Describe different forms in which texts may be presented	
2. Understand the purpose and value of following procedures when preparing text from shorthand	2.1 Explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from shorthand 2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so 2.3 Explain the purpose of storing texts and original shorthand notes safely and securely, and ways of doing so 2.4 Explain the purpose of confidentiality and data protection when preparing texts from shorthand notes 2.5 Explain the purpose and benefits of meeting deadlines	
3. Be able to prepare for tasks, and use shorthand to take dictation	3.1 Agree the purpose, format, and deadlines for preparing texts from shorthand 3.2 Take dictation using shorthand at a minimum speed of 60 words per minute	
4. Be able to produce texts from shorthand	4.1 Clarify text requirements, when necessary 4.2 Input and format texts to an agreed format from shorthand	

	<p>notes</p> <p>4.3 Make efficient use of technology, as required</p> <p>4.4 Read and check texts for accuracy</p> <p>4.5 Edit and correct texts, as required</p> <p>4.6 Store texts and original shorthand notes safely and securely following organisational procedures</p> <p>4.7 Present texts to the required format and within the agreed deadlines</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about preparing different types of text from shorthand notes, where the notes are taken at a minimum speed of 60 words per minute.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	55

Title	Prepare text from recorded audio instruction (40 wpm)
CfA Unit No.	Q216
WBA Unit No.	L/601/2486
Level	2
Credit Value	4
GLH	35
Learning Outcomes	Assessment Criteria
The learner will	The learner can
1. Understand the task of preparing text from recorded audio instruction	<p>1.1 Describe different types of documents that may be produced from recorded audio and the formats to be followed</p> <p>1.2 Describe different forms in which texts may be presented</p> <p>1.3 Describe the different types of technology that are available for playing back recordings and their main features</p>
2. Understand the purpose and value of following procedures when preparing text from recorded audio instruction	<p>2.1 Explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from recorded audio instruction</p> <p>2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so</p> <p>2.3 Explain the purpose of storing texts and original recordings safely and securely, and ways of doing so</p> <p>2.4 Explain the purpose of confidentiality and data protection when preparing texts from recorded audio</p> <p>2.5 Explain the purpose and benefits of meeting deadlines</p>
3. Be able to produce texts from audio recordings	<p>3.1 Agree the purpose, format, and deadlines for texts</p> <p>3.2 Input text from audio recordings at a minimum speed of 40 words per minute</p> <p>3.3 Format texts to agreed format</p>

	<p>making efficient use of available technology</p> <p>3.4 Clarify text requirements when necessary</p> <p>3.5 Read and check texts for accuracy</p> <p>3.6 Edit and correct texts, as required</p> <p>3.7 Store texts and original recordings safely and securely following organisational procedures</p> <p>3.8 Present texts to the required format and within the agreed deadlines</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about preparing different types of text from audio recordings, where the recording is made at a minimum speed of 40 words per minute.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	35

Title	Design and produce documents in a business environment	
CfA Unit No.	Q312	
WBA Unit No.	M/601/2531	
Level	3	
Credit Value	4	
GLH	25	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose and value of designing and producing high quality and attractive documents	1.1 Describe different types of documents that may be designed and produced and the different styles that could be used 1.2 Describe different formats in which text may be presented 1.3 Explain the purpose and benefits of designing and producing high quality and attractive documents	
2. Know the resources available to design and produce documents and how to use them	2.1 Describe the types of resources needed to design and produce high quality and attractive documents 2.2 Explain the purpose and benefits of using different types of resource to design and produce high quality and attractive documents 2.3 Describe different types of technology available for inputting, formatting and editing text, and their main features	
3. Understand the purpose and value of following procedures when designing and producing documents	3.1 Explain the value and benefits of agreeing the purpose, content, style, and deadlines for the design and production of documents 3.2 Describe ways of researching and organising content needed for documents 3.3 Describe ways of integrating and laying out text and non-text 3.4 Describe ways of checking finished documents for accuracy –	

	<p>including spelling, grammar and punctuation – and correctness, and the purpose of doing so</p> <p>3.5 Explain the purpose of storing documents safely and securely, and ways of doing so</p> <p>3.6 Explain the purpose of confidentiality and data protection when preparing documents</p> <p>3.7 Explain the purpose and benefits of meeting deadlines</p>
4. Be able to design and produce documents to agreed specifications	<p>4.1 Agree the purpose, content, style and deadlines for documents</p> <p>4.2 Identify and prepare resources needed to design and produce documents</p> <p>4.3 Research and organise the content required for documents</p> <p>4.4 Make appropriate and efficient use of technology, as required</p> <p>4.5 Design, format and produce documents to an agreed style</p> <p>4.6 Integrate non-text objects into an agreed layout, if required</p> <p>4.7 Check texts and objects for accuracy</p> <p>4.8 Edit and correct texts and objects as required</p> <p>4.9 Clarify document requirements, if necessary</p> <p>4.10 Store documents safely and securely following organisational procedures</p> <p>4.11 Present documents to the required format, and within the agreed deadlines</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about designing and preparing high quality and attractive documents to agreed layouts, formats and styles.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other	Council for Administration (CfA)

professional standards or curricula (if appropriate)	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	25

Title	Prepare text from notes using touch typing (60 wpm)
CfA Unit No.	Q313
WBA Unit No.	T/601/2532
Level	3
Credit Value	4
GLH	10
Learning Outcomes	Assessment Criteria
The learner will	The learner can
1. Understand the task of preparing text from notes using touch typing	<p>1.1 Describe different types of documents that may be produced from notes and the format to be followed</p> <p>1.2 Describe different forms in which texts may be presented</p> <p>1.3 Explain the difference between producing text from own notes and producing text from others' notes</p>
2. Understand the purpose and benefits of following procedures when preparing text using touch typing	<p>2.1 Explain the value and benefits of agreeing the purpose, format and deadline for texts</p> <p>2.2 Explain the benefits of accuracy – including spelling, grammar and punctuation – when preparing typed text from notes</p> <p>2.3 Describe ways of checking finished documents for accuracy and correctness, and the purpose of doing so</p> <p>2.4 Explain the purpose of storing text and original notes safely and securely, and ways of doing so</p> <p>2.5 Explain the purpose of confidentiality and data protection when preparing text from notes</p> <p>2.6 Explain the purpose and benefits of meeting deadlines</p>
3. Be able to prepare for tasks	3.1 Agree the purpose, format and deadlines for texts
4. Be able to produce texts using touch typing at a minimum speed of 60 wpm	<p>4.1 Input texts using touch typing to a minimum speed of 60 words per minute</p> <p>4.2 Format texts to agreed format</p>

	<p>making best the use of available technology</p> <p>4.3 Clarify text requirements when necessary</p> <p>4.4 Read and check texts for accuracy</p> <p>4.5 Edit and correct texts, as required</p> <p>4.6 Store texts and original notes safely and securely following organisational procedures</p> <p>4.7 Present texts to the required format and within the agreed deadlines</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about preparing different types of text using touch typing at a minimum speed of 60 words per minute.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	10

Title	Prepare text from shorthand (80 wpm)	
CfA Unit No.	Q314	
WBA Unit No.	A/601/2533	
Level	3	
Credit Value	8	
GLH	45	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the task of preparing text from shorthand	1.1 Describe different types of documents that may be produced from shorthand and the formats to be followed 1.2 Describe different forms in which shorthand texts may be presented	
2. Understand the purpose and value of following procedures when preparing text from shorthand	2.1 Explain the value and benefits of agreeing the purpose, format and deadline for texts prepared from shorthand 2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so 2.3 Explain the purpose of storing text and original shorthand notes safely and securely, and ways of doing so 2.4 Explain the purpose of confidentiality and data protection when preparing text from shorthand notes 2.5 Explain the purpose and benefits of meeting deadlines	
3. Be able to prepare for tasks, and use shorthand to take dictation	3.1 Agree the purpose, format, and deadlines for texts 3.2 Take dictation using shorthand at a minimum of 80 words per minute	
4. Be able to produce texts from shorthand	4.1 Get clarification of points as required 4.2 Input and format texts to an agreed format from shorthand	

	<p>notes</p> <p>4.3 Make efficient use of technology, as required</p> <p>4.4 Read and check texts for accuracy</p> <p>4.5 Edit and correct texts, as required</p> <p>4.6 Store texts and original shorthand notes safely and securely following organisational procedures</p> <p>4.7 Present texts to the required format, within the agreed deadlines</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about preparing different types of text from shorthand notes at minimum speed of 80 words per minute.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	45

Title	Prepare text from recorded audio instruction (60 wpm)
CfA Unit No.	Q315
WBA Unit No.	F/601/2534
Level	3
Credit Value	4
GLH	25
Learning Outcomes	Assessment Criteria
The learner will	The learner can
1. Understand the task of preparing text from recorded audio instruction	<p>1.1 Describe different types of documents that may be produced from recorded audio and the formats to be followed</p> <p>1.2 Describe different forms in which texts may be presented</p> <p>1.3 Describe the different types of technology that are available for playing back recordings and their main features</p>
2. Understand the purpose and value of following procedures when preparing text from recorded audio instruction	<p>2.1 Explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from recorded audio instruction</p> <p>2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so</p> <p>2.3 Explain the purpose of storing text and original recordings safely and securely, and ways of doing so</p> <p>2.4 Explain the purpose of confidentiality and data protection when preparing text from recorded audio</p> <p>2.5 Explain the purpose and benefits of meeting deadlines</p>
3. Be able to produce texts from audio recordings	<p>3.1 Agree the purpose, format, and deadlines for texts prepared from audio recordings</p> <p>3.2 Input text from an audio recordings at a minimum speed of 60 words per minute</p>

	<p>3.3 Format texts to agreed format making best use of available technology</p> <p>3.4 Clarify text requirements when necessary</p> <p>3.5 Read and check texts for accuracy</p> <p>3.6 Edit and correct texts, as required</p> <p>3.7 Store texts and original recording safely and securely following organisational procedures</p> <p>3.8 Present texts to the required format, within the agreed deadlines</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about preparing different types of text from audio recoding at a minimum speed of 60 words per minute.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	25

Events and Meetings

Title	Support the organisation of an event
CfA Unit No.	Q223
WBA Unit No.	L/601/2505
Level	2
Credit Value	2
GLH	15
Learning Outcomes	Assessment Criteria
The learner will	The learner can
1. Understand the role and purpose of providing support with the organisation of an event	1.1 Describe the role and responsibilities required when supporting the organisation of an event 1.2 Identify a range of support activities that may be required when supporting the organisation of an event 1.3 Identify the purpose and value of giving assistance with organising an event 1.4 Describe the different types of events and their main features 1.5 Describe the types of risks associated with events and how to minimise these 1.6 Outline the types of information that delegates will need 1.7 Explain how to identify suitable venues for different types of events 1.8 Describe the types of resources needed to prepare for different types of events 1.9 Outline the different special requirements that delegates may have and how to meet these 1.10 Describe the health, safety and security requirements that need to be considered when organising events
2. Be able to support the organisation of an event	2.1 Contribute to the organisation of an event by:

	<ul style="list-style-type: none"> a) supporting the implementation of the plan for the event to meet agreed objectives b) identifying resources and support needed for organising an event c) identifying and costing suitable venues d) arranging resources and production of event materials e) preparing and sending of invitations to delegates f) co-ordinating delegate responses g) liaising with the venue to confirm event requirements h) providing delegates with joining instructions and event materials i) rehearsing arrangements to make sure the event runs smoothly, if required j) following all legal and contractual requirements k) following the relevant health, safety and security requirements for the event
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about supporting the organisation of an event.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	15

Title	Support the co-ordination of an event	
CfA Unit No.	Q224	
WBA Unit No.	D/601/2508	
Level	2	
Credit Value	3	
GLH	20	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the role and purpose of supporting the co-ordination of an event	1.1 Describe the range of support activities that may be required when supporting the co-ordination of an event 1.2 Identify the responsibilities involved in supporting the co-ordination of an event 1.3 Describe the types of problems that may occur during events and how to deal with these 1.4 Describe the points to observe when clearing and vacating an event 1.5 Describe the types of follow-up activities that may be required to carry out the co-ordination of an event	
2. Be able to support the co-ordination of an event	2.1 Contribute to the co-ordination of an event by: <ul style="list-style-type: none"> a) preparing the venue and making sure all necessary resources and supporting activities are in place b) arranging resources during an event, in line with agreed plans c) helping delegates to feel welcome d) meeting delegates' needs throughout an event e) resolving or referring problems, as required f) liaising with the management of the venue to make sure facility resources are in place 	

	<p>g) clearing, and vacating the venue according to the terms of the contract</p> <p>h) preparing and circulating papers, or completing other follow up actions following the event, if required</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about supporting the co-ordination and delivery of an event.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	20

Title	Support the organisation of business travel or accommodation	
CfA Unit No.	Q225	
WBA Unit No.	Y/601/2510	
Level	2	
Credit Value	3	
GLH	18	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose of confirming a brief and budget for business travel or accommodation	1.1 Explain the purpose of obtaining and confirming instructions for arranging business travel or accommodation 1.2 Explain the purpose and benefits of confirming the requirements of a brief and budget for business travel or accommodation arrangements 1.3 Explain the purpose of following the requirements of a brief and budget for business travel or accommodation arrangements 1.4 Describe how to support the organisation of business travel or accommodation to meet expectations 1.5 Describe the main types of business travel or accommodation arrangements that may need to be made and the procedures to follow 1.6 Describe how to obtain best value for money when making business travel or accommodation arrangements 1.7 Describe how to keep records of business travel or accommodation arrangements 1.8 Outline the documents and information to provide to the person who is travelling and how to obtain these 1.9 Describe the types of problems that may occur with business	

	travel or accommodation arrangements and the correct procedures to follow in order to deal with these problems
2. Know the sources of information and facilities available to make business travel or accommodation arrangements	2.1 Describe sources of information, and the facilities available, for making business travel or accommodation arrangements
3. Be able to support the organisation with business travel or accommodation arrangements	<p>3.1 Confirm the brief and budget for business travel or accommodation arrangements</p> <p>3.2 Check a draft itinerary and schedule with organiser or traveller(s)</p> <p>3.3 Identify suitable business travel or accommodation options</p> <p>3.4 Book suitable business travel or accommodation arrangements, following instructions:</p> <p style="padding-left: 20px;">a) to meet the brief and budget using available sources of information and facilities</p> <p style="padding-left: 20px;">b) obtaining best value for money</p> <p style="padding-left: 20px;">c) making payment or agreeing payment arrangements</p> <p>3.4 Obtain confirmations, and collate documents for business travel or accommodation arrangements</p> <p>3.5 Maintain records of business travel or accommodation arranged</p> <p>3.6 Provide the organiser or traveller(s) with an itinerary and required documents in good time</p> <p>3.7 Confirm with the organiser or traveller(s) that itinerary and documents meet requirements</p> <p>3.8 Resolve or refer problems to the appropriate person</p>

Additional Information about the unit

Unit purpose and aim(s)	This unit is about supporting the delivery of business travel or accommodation arrangements following instruction from the organiser or traveller(s).
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Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	18

Title	Support the organisation of meetings	
CfA Unit No.	Q226	
WBA Unit No.	T/601/2515	
Level	2	
Credit Value	4	
GLH	18	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the arrangements to be made to support the planning and organising of meetings	1.1 Describe the role and responsibilities for supporting the organiser of the meeting 1.2 Describe different types of meetings and their main features 1.3 Describe how to help plan meetings to meet agreed aims and objectives 1.4 Describe the types of resources that may be needed for different types of meetings 1.5 Describe health, safety and security arrangements to follow when organising meetings 1.6 Explain the purpose of following the agreed brief, plan and the resources required, for arranging a meeting 1.7 Identify the sources and types of information and services needed to arrange a meeting 1.8 Describe how to help the meeting organiser during the meeting 1.9 Describe the organisational procedures for clearing and vacating a meeting room	
2. Be able to prepare for a meeting	2.1 Confirm the purpose and venue of a meeting 2.2 Confirm a budget for a meeting, if required 2.3 Organise and confirm venue, equipment and catering requirement, if required requirements	

	<p>2.4 Invite attendees and confirm attendance</p> <p>2.5 Collate and dispatch papers for a meeting within agreed timescales</p> <p>2.6 Make sure attendees' needs are met</p> <p>2.7 Make sure equipment and layout of the rooms meets the meeting brief</p> <p>2.8 Keep records of arrangements made and services used</p> <p>2.9 Attend to any requirements during the meeting as directed by the meeting organiser</p>
3. Be able to follow up a meeting	<p>3.1 Follow organisation procedures for clearing a meeting room</p> <p>3.2 Circulate a meeting record to agreed timescales</p> <p>3.3 Make sure arrangements for payments have been met, if required</p> <p>3.4 Contribute to the evaluation of arrangements made for meetings, as required</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about supporting the planning and organisation of meetings.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	18

Title	Plan and organise an event	
CfA Unit No.	Q320	
WBA Unit No.	R/601/2540	
Level	3	
Credit Value	4	
GLH	28	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the role of an event organiser in planning an event	1.1 Explain the purpose and benefits of planning an event 1.2 Explain the role of the event organiser in: a) meeting the objectives of the event b) agreeing a brief and budget for the event 1.3 Identify and evaluate the types of risks associated with events and explain how to minimise these 1.4 Explain the purpose and benefits of a contingency plan for an event 1.5 Describe the types of problems that may occur when organising an event and how to solve them 1.6 Categorise different types of events and their main features	
2. Understand the arrangements to be made when planning and organising an event	2.1 Explain the role of the event organiser for a) anticipating and planning for all delegate provision and needs before and during the event, including investigating and providing for any special requirements b) meeting relevant health, safety and security arrangements c) meeting legal and organisational requirements for contracts d) organising resources and the production of event materials	

	<p>e) the types of activities and resources that may be needed during an event</p> <p>f) liaison with the venue and the supporting team to make sure all requirements are met and roles are understood</p>
<p>3. Understand the different types of venues and resources needed for different types of events</p>	<p>3.1 Identify and evaluate different types of venue in terms of suitability for events and costs</p> <p>3.2 Describe a range of resources that may be needed for events and illustrate how they may be used</p> <p>3.3 Identify examples, and explain the purpose and benefits of selection criteria when choosing a venue and resources for an event</p>
<p>4. Be able to plan and organise an event</p>	<p>4.1 Agree an event brief and budget</p> <p>4.2 Agree a plan for an event, which will meet agreed objectives and address any identified risks and contingencies</p> <p>4.3 Identify and agree resources and support needed for organising an event</p> <p>4.4 Agree requirements for venue(s)</p> <p>4.5 Identify venue and agree costings</p> <p>4.6 Liaise with the venue to confirm event requirements and / or any special delegate requirements</p> <p>4.7 Agree requirements for resources</p> <p>4.8 Co-ordinate resources and production of event materials</p> <p>4.9 Make sure arrangements are in place for the event to meet relevant health, safety and security requirements</p> <p>4.10 Make sure legal and organisational requirements for contracts are met</p> <p>4.11 Make sure that all those involved are briefed and trained to fulfil their roles</p> <p>4.12 Delegate functions to the event</p>

	<p>team as required</p> <p>4.13 Make arrangements for rehearsals to make sure the event runs smoothly, if required</p> <p>4.14 Make sure invitations are sent out to delegates</p> <p>4.15 Manage delegate responses</p> <p>4.16 Prepare joining instructions and event materials to be sent to delegates</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about planning and organising an event.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	28

Title	Co-ordinate an event	
CfA Unit No.	Q321	
WBA Unit No.	Y/601/2541	
Level	3	
Credit Value	4	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the role of an event co-ordinator in managing an event to meet the objectives of the brief	1.1 Explain the responsibilities of an event co-ordinator 1.2 Describe the purpose of agreeing a plan that meets the objectives of the event brief	
2. Understand the activities required when co-ordinating an event	2.1 Explain the role of the event co-ordinator during the event for: a) all delegate provision and needs, b) meeting relevant health, safety and security requirements c) observing legal and organisational requirements for contracts d) co-ordinating resources and the use of event materials e) liaising with the venue and supporting team during an event to make sure all requirements are met and roles are carried out f) resolving problems g) overseeing the work of key staff 2.2 Explain the role of an event co-ordinator after an event for: a) clearing and vacating the venue b) organising follow up papers and activities, if required c) reconciling accounts to budget d) evaluating an event and the methods that can be used to do this	

<p>3. Be able to co-ordinate an event</p>	<p>3.1 Prepare the venue and make sure all necessary resources are in place</p> <p>3.2 Co-ordinate activities during an event, in line with agreed plans</p> <p>3.3 Help delegates to feel welcome</p> <p>3.4 Respond to delegates' needs throughout an event</p> <p>3.5 Resolve problems, as required</p> <p>3.6 Oversee the work of key staff during the event</p> <p>3.7 Monitor compliance with relevant health, safety and security requirements</p> <p>3.8 Liaise with the management of the venue to make sure facility resources are in place</p> <p>3.9 Arrange clearing, and vacating the venue according to the terms of the contract</p> <p>3.10 Prepare and circulate papers, or complete other follow up actions following the event, if required</p> <p>3.11 Reconcile accounts to budget, if required</p> <p>3.12 Evaluate an event identifying recommendations and passing these on to relevant colleagues, where relevant</p> <p>3.13 Agree key learning points and use these to improve the running of future events</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about co-ordinating the delivery of an event.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration

Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	25

Title	Plan and organise meetings	
CfA Unit No.	Q322	
WBA Unit No.	D/601/2542	
Level	3	
Credit Value	5	
GLH	25	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the arrangements and actions required for planning and organising meetings	1.1 Explain the role of the person planning and organising a meeting 1.2 Describe the different types of meetings and their main features 1.3 Explain how to plan meetings that meet agreed aims and objectives 1.4 Explain the purpose of agreeing a brief for the meeting 1.5 Explain how to identify suitable venues for different types of meetings 1.6 Describe the types of resources needed for different types of meetings 1.7. Outline the main points that should be covered by an agenda and meeting papers 1.8 Explain the purpose of meeting attendees' needs and special requirements, and providing them with information required for meetings 1.9 Describe the health, safety and security requirements that need to be considered when organising meetings 1.10 Explain the purpose and benefits of briefing the chair before a meeting 1.11 Explain the purpose of welcoming and providing suitable refreshments to attendees, if required 1.12 Describe the types of	

	<p>information, advice and support that may be need to be provided during a meeting</p> <p>1.13 Describe the types of problems that may occur during a meeting and how to solve them</p> <p>1.14 Explain what should be included in a record of a meeting, and the purpose of ensuring the record is accurate and approved</p> <p>1.15 Explain how to record actions and follow up, if required</p> <p>1.16 Explain the purpose of collecting and evaluating participant feedback from the meeting</p> <p>1.17 Describe how to agree learning points to improve the organisation of future meetings</p>
<p>2. Be able to prepare for a meeting</p>	<p>2.1 Agree and prepare the meeting brief, checking with others, if required</p> <p>2.2 Agree a budget for the meeting, if required</p> <p>2.3 Prepare and agree an agenda and meeting papers</p> <p>2.4 Organise and confirm venue, equipment and catering requirements, when necessary</p> <p>2.5 Invite attendees, confirm attendance and identify any special requirements</p> <p>2.6 Arrange catering, if required</p> <p>2.7 Arrange the equipment and layout of the room, if required</p> <p>2.8 Make sure the chair receives appropriate briefing</p>
<p>3. Be able to support running a meeting</p>	<p>3.1 Welcome attendees and offer suitable refreshments (if required)</p> <p>3.2 Make sure attendees have full set of papers</p> <p>3.3 Make sure a person has been nominated to take minutes, if required</p> <p>3.4 Provide information, advice and</p>

	support when required
4. How to follow up a meeting	<p>4.1 Produce a record of the meeting</p> <p>4.2 Seek approval for the meeting record, amend as required</p> <p>4.3 Respond to requests for amendments and arrange recirculation of a revised meeting record</p> <p>4.4 Follow up action points, if required</p> <p>4.5 Evaluate meeting arrangements, and external services where used</p> <p>4.6 Evaluate participant feedback from the meeting and share results with relevant people, where used</p> <p>4.7 Summarise learning points and use these to identify improvements that can be made to future meeting arrangements and support</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about planning and organising meetings to meet the agreed purpose of the meeting.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	25

Title	Organise business travel or accommodation	
CfA Unit No.	Q323	
WBA Unit No.	H/601/2543	
Level	3	
Credit Value	5	
GLH	20	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the range of information, requirements and procedures that may be needed for all types of business travel or accommodation arrangements	1.1 Explain the purpose and benefits of agreeing the brief and budget of travel or accommodation arrangements with traveller(s) 1.2 Explain how to organise business travel or accommodation to meet expectations 1.3 The sources of information and facilities that are used to make travel or accommodation arrangements 1.4 Describe the main types of business travel or accommodation arrangements that can be made, including those requiring additional specialist documents and facilities 1.5 How to obtain best value for money when making travel or accommodation arrangements 1.6 Explain procedures for obtaining specific information, facilities or documents for a) payment facilities and foreign currency, if required b) insurance and health precautions, if required c) visas, and passport requirements, if required d) security and emergencies, if required 1.7 How to keep records of travel or accommodation arrangements, including financial records 1.8 The types of information that are	

	confidential and how to store them in line with current legislation
2. Understand the types of problems that may occur with business travel or accommodation arrangements and how to deal with them	<p>2.1 Describe problems that may occur when making arrangements for business travel or accommodation</p> <p>2.2 Explain ways of resolving problems that may arise</p>
3. Be able to organise different types of business travel or accommodation arrangements	<p>3.1 Agree the business travel or accommodation brief and budget with traveller(s)</p> <p>3.2 Check draft itinerary and schedule with a traveller(s)</p> <p>3.3 Research suitable business travel or accommodation options</p> <p>3.4 Make business travel arrangements or book accommodation, to brief and budget, obtaining best value for money</p> <p>3.5 Make necessary payments or arrange payment facilities</p> <p>3.6 Make additional arrangements for international travel and accommodation, if required</p> <p>3.7 Obtain confirmations and record all details of arrangements</p> <p>3.8 Collate all documents and other items</p> <p>3.9 Keep business travel items (if required) safe and secure until handed over</p> <p>3.10 Provide traveller(s) with itinerary and all required information and documents, in good time</p> <p>3.11 Confirm with traveller(s) that all items provided meet requirements</p> <p>3.12 Resolve problems that may arise</p>

Additional Information about the unit

Unit purpose and aim(s)	This unit is about organising the delivery of travel or accommodation arrangements to meet the travellers
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	brief within budget.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	30

Title	Evaluate the organisation of business travel or accommodation	
CfA Unit No.	Q324	
WBA Unit No.	K/601/2544	
Level	3	
Credit Value	2	
GLH	10	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose and processes of evaluating business travel or accommodation arrangements	<p>1.1 Describe different criteria that may be used to evaluate arrangements for business travel or accommodation</p> <p>1.2 Explain the benefits of evaluating business travel or accommodation arrangements for individuals and organisations</p>	
2. Be able to evaluate business travel or accommodation arrangements	<p>2.1 Use records of business travel and accommodation arrangements made and services used and assess their effectiveness</p> <p>2.2 Use feedback from a traveller(s) to assess the effectiveness of business travel and accommodation arrangements made and services used</p> <p>2.3 Record outcomes of evaluations to inform future service expectations</p> <p>2.4 Make recommendations to the appropriate people to update business travel or accommodation policies and procedures</p>	

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about evaluating the effectiveness of processes, services, etc involved in the delivery of business travel or accommodation arrangements.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other	Council for Administration (CfA)

professional standards or curricula (if appropriate)	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	10

Communications

Title	Use electronic message systems	
CfA Unit No.	Q207	
WBA Unit No.	H/601/2476	
Level	2	
Credit Value	1	
GLH	6	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the use of electronic message systems	1.1 Describe the main types of electronic message systems 1.2 Describe the different features of electronic message systems 1.3 Explain the purpose of keeping an electronic message system up to date 1.4 Describe how to use an electronic message system to check and delete or discard messages 1.5 Explain the purpose of leaving clear messages for others	
2. Be able to use electronic message systems	2.1 Keep a message system up to date 2.2 Check system for messages 2.3 Respond to messages within agreed timescales 2.4 Delete messages when dealt with 2.5 Select the information to be given when taking or leaving messages 2.6 Leave messages on other people's systems, if required	

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about organising and updating messages using an electronic message system.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or	Assessment Strategy

guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	6

Title	Use a diary system	
CfA Unit No.	Q208	
WBA Unit No.	K/601/2477	
Level	2	
Credit Value	3	
GLH	9	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand a diary system	1.1 Explain the purpose of using a diary system 1.2 Describe different types of diary systems 1.3 Describe the purpose of obtaining relevant information about requested diary entries and changes	
2. Understand how to use a diary system	2.1 Describe the types of information needed for diary entries 2.2 Explain how to prioritise requests 2.3 Explain the purpose of prioritising requests 2.4 Explain the purpose of trying to balance the needs of all those involved 2.5 Explain the purpose of communicating changes to those affected 2.6 Explain the purpose of keeping a diary system up to date 2.7 Describe the different types of problems that may occur when new requests are made and solutions to these problems 2.8 Explain the purpose of following security and confidentiality procedures when using a diary system	
3. Be able to use a diary system	3.1 Obtain information needed to make diary entries 3.2 Make diary entries accurately and clearly 3.3 Prioritise changes to entries, as	

	<p>required</p> <p>3.4 Record agreed changes in the diary</p> <p>3.5 Identify and report the effects of any changes for existing entries</p> <p>3.6 Solve problems by negotiating alternative arrangements, when necessary</p> <p>3.7 Keep a diary up to date and store it securely</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about using a diary system to organise and record work activities so that planned work can take place.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	9

Title	Take minutes	
CfA Unit No.	Q209	
WBA Unit No.	M/601/2478	
Level	2	
Credit Value	4	
GLH	15	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the task of taking minutes at meetings	1.1 Describe the purpose of meetings 1.2 Describe legal and organisational requirements that may apply to minute taking 1.3 Explain the purpose of minutes as an accurate record of discussions and decisions 1.4 Describe the purpose of documents and terms that are commonly used in meetings	
2. Understand the role of the chair and other formal responsibilities in meetings	2.1 Explain the role of the chair and other formal responsibilities within meetings 2.2 Describe how to work in partnership with the chair when taking minutes	
3. Know how to take minutes at meetings	3.1 Explain the purpose of listening actively when taking minutes 3.2 Explain how to listen actively when minute taking 3.3 Describe how to take notes during discussions held at meetings 3.4 Explain the purpose of getting clarification 3.5 Describe how to get clarification 3.6 Describe different types of minutes and their purpose 3.7 Describe the different styles of writing that may be used in minute taking 3.8 Explain how to sort, select and structure information to produce minutes 3.9 Explain what is meant by using	

	the correct tone and professional language in minutes
4. Be able to prepare for taking minutes	<p>4.1 Prepare for taking minutes, as required</p> <p>4.2 Communicate with the meeting chair, as required</p> <p>4.3 Note any changes to the agenda, matters arising and action points from last meeting</p>
5. Be able to minute meetings	<p>5.1 Take notes at a meeting of all items required</p> <p>5.2 Produce accurate minutes that record the meaning of discussions and decisions taken</p> <p>5.3 Make sure minutes are in the agreed style</p> <p>5.4 Make sure the process for signing off minutes and / or action points has been agreed</p> <p>5.5 Check minutes and make necessary amendments</p> <p>5.6 Agree minutes with the relevant people and circulate them within the agreed timescales</p> <p>5.7 Follow organisational requirements for confidentiality and security of information, as required</p> <p>5.8 Make sure follow-up actions, and who is responsible for taking the actions, have been clearly identified</p> <p>5.9 Store notes and minutes following organisational procedures</p> <p>5.10 Follow legal and organisational requirements for minute taking, as necessary</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about taking minutes at different kinds of meetings, where an accurate record is needed of decisions made and actions agreed.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national	Council for Administration (CfA)

occupational standards or other professional standards or curricula (if appropriate)	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	15

Title	Develop a presentation	
CfA Unit No.	Q310	
WBA Unit No.	M/601/2528	
Level	3	
Credit Value	3	
GLH	15	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose of preparing for and evaluating a presentation	1.1 Explain the purpose of using different types of presentation and equipment to provide information 1.2 Explain the procedures to be followed when preparing a presentation, including planning, preparation of content, materials, and contingencies 1.3 Explain the benefits of preparing for giving a presentation 1.4 Explain and illustrate how presentations may be enhanced by materials and equipment 1.5. Explain the purpose and benefits of reflecting on the feedback obtained of the written presentation	
2. Be able to develop a presentation	2.1 Agree and confirm audience, purpose, content, style and timing of a presentation 2.2 Research and plan a presentation 2.3 Select any equipment needed for the presentation 2.4 Prepare content, shape and structure of a presentation to achieve its purpose and suit needs of audience 2.5 Obtain feedback on planned presentation and make adjustments, if required 2.6 Produce presentation handouts 2.7 Collect feedback on the written presentation	

	<p>2.8 Reflect on the feedback obtained of the written presentation and identify learning points</p> <p>2.9 Identify changes that will improve future written presentations</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about developing a presentation.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	15

Title	Deliver a presentation	
CfA Unit No.	Q311	
WBA Unit No.	T/601/2529	
Level	3	
Credit Value	3	
GLH	15	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose of preparing for and evaluating a presentation	1.1 Explain the purpose of using different types of presentation and equipment 1.2 Explain different ways of delivering presentations and their features 1.3 Explain the procedures to be followed when preparing a presentation 1.4 Explain the benefits of preparing for giving a presentation 1.5 Describe the types of problems that may occur with equipment and how to deal with them 1.6 Explain the purpose and benefits of contingency planning 1.7 Explain the purpose and benefits of collecting feedback from the audience on the presentation 1.8 Explain the purpose and benefits of evaluating presentations and own performance	
2. Understand the techniques used in enhancing a presentation	2.1 Explain and illustrate how presentations may be enhanced by materials and equipment 2.2 Explain and illustrate how presentations may be enhanced by use of communication and interpersonal skills 2.3 Describe how to gauge audience reaction to the presentation 2.4 Explain the purpose and benefits of summarising important features of the presentation	

	2.5 Describe the purpose and benefits of giving the audience opportunities to ask questions
3. Be able to prepare for delivery of a presentation	<p>3.1 Select any equipment needed and plan how to use it to best effect</p> <p>3.2 Make contingency plans in case of equipment failure or other problems, if required</p> <p>3.3 Practise the presentation and its timing</p> <p>3.4 Obtain feedback on planned presentation and make adjustments, if required</p>
4. Be able to deliver a presentation	<p>4.1 Check equipment and resources</p> <p>4.2 Circulate presentation materials</p> <p>4.3 Introduce self to audience and state aims of the presentation</p> <p>4.4 Address the audience, speaking clearly and confidently, using language to suit the topic and audience</p> <p>4.5 Vary tone, pace and volume to emphasise key points</p> <p>4.6 Gauge audience reaction during the presentation and adapt if required</p> <p>4.7 Summarise throughout the presentation to emphasise key points and help to maintain audience interest</p> <p>4.8 Use body language in a way that reinforces presented information</p> <p>4.9 Use equipment, where appropriate, to enhance the presentation, and deal with any problems that may occur</p> <p>4.10 Provide the audience with opportunities to ask questions</p> <p>4.11 Listen carefully to questions and respond in a way that meets the audience's needs</p>
5. Be able to evaluate a presentation	<p>5.1 Collect feedback on the presentation</p> <p>5.2 Reflect on own performance and</p>

	<p>identify learning points</p> <p>5.3 Evaluate the presentation and own performance and identify changes that will improve future presentations</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit covers the skills, knowledge and understanding learners need to prepare for, deliver and evaluate a presentation for an audience.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	15

Customer Service

Title	Handle mail
CfA Unit No.	Q210
WBA Unit No.	T/601/2479
Level	2
Credit Value	3
GLH	17
Learning Outcomes	Assessment Criteria
The learner will	The learner can
1. Understand security procedures when handling mail or packages	<p>1.1 Explain the purpose of security procedures for handling mail or packages</p> <p>1.2 Give examples of security procedures for handling mail in organisation(s)</p>
2. Understand the range of available internal and external mail services	<p>2.1. Explain the purpose of distributing and dispatching mail to the correct recipient within agreed timescales</p> <p>2.2 State the organisational structure and names, roles and locations of individuals and teams</p> <p>2.3 Give examples of internal and external mail services available to organisations</p> <p>2.4 Give reasons for selecting internal and external mail services</p> <p>2.5 Describe the methods of calculating postage charges for mail or packages</p> <p>2.6 Describe the types of problems that may occur with incoming and outgoing mail and how to deal with these</p>
3. Be able to receive, distribute and collect internal mail or packages	<p>3.1 Receive, check and sort incoming mail or packages</p> <p>3.2 Identify and deal with unwanted junk mail or damaged items</p> <p>3.3 Identify and deal with suspicious items</p> <p>3.4 Distribute incoming mail or packages</p>

	3.5 Collect, sort and prioritise outgoing mail or packages
4. Be able to follow procedures for despatching mail or packages	<p>4.1 Identify best options for despatching mail</p> <p>4.2 Agree a cost for despatching mail or packages</p> <p>4.3 Arrange services to collect outgoing mail or packages, if required</p> <p>4.4 Identify and prepare items for urgent or special delivery, where necessary</p> <p>4.5 Calculate correct postage charges for outgoing mail or packages</p> <p>4.6 Record postage costs</p> <p>4.7 Despatch outgoing mail or packages to agreed timescale</p>
5. Be able to resolve, report or refer problems that may occur in handling mail or packages	<p>5.1 Identify where a problem may exist with incoming and outgoing mail or packages</p> <p>5.2 Resolve, report or refer problems with incoming and outgoing mail or packages</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about handling internal and external mail and packages within the service requirements of an organisation.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	17

Title	Provide reception services	
CfA Unit No.	Q211	
WBA Unit No.	K/601/2480	
Level	2	
Credit Value	3	
GLH	15	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose of reception services in a business environment	1.1 Explain the purpose of the receptionist role as the first point of contact between the public / client and an organisation 1.2 Explain the purpose of presenting a positive image of self and the organisation 1.3 Explain how to present a positive image of self and the organisation	
2. Understand the procedures to be followed when providing reception services	2.1 Describe the structure and lines of communication in an organisation 2.2 Explain how the structure in an organisation affects lines of communication 2.3 Explain the purpose of entry, departure, security and confidentiality procedures, including own responsibilities 2.4 Explain how to carry out entry, departure, security and confidentiality procedures in a reception area 2.5 Explain the purpose of health and safety procedures when providing a reception service, including own responsibilities 2.6 Explain how to carry out health and safety procedures in a reception area 2.7 Describe the emergency procedures and your role within them 2.8 Describe the types of problems that may occur with visitors	

	<p>including, conflict and aggression</p> <p>2.9 Explain ways of dealing with problems and when to refer them to an appropriate colleague</p>
3. Understand ways of improving reception services and developing own role	<p>3.1 Explain the purpose of suggesting ideas for improving a reception area</p> <p>3.2 Explain the purpose of carrying out additional duties, if applicable, and give examples</p>
4. Provide a reception service	<p>4.1 Present a positive image of self and the organisation</p> <p>4.2 Provide individuals with requested information and other useful information, within guidelines on confidentiality</p> <p>4.3 Follow entry and exit security procedures, if required</p> <p>4.4 Follow relevant health and safety procedures</p> <p>4.5 Deal with problems that may occur, if necessary</p> <p>4.6 Refer problems, as required</p> <p>4.7 Make sure a reception area gives a positive image of the organisation</p> <p>4.8 Make suggestions for improving a reception area, as required</p> <p>4.9 Follow organisational procedures in the event of an accident or emergency, as required</p> <p>4.10 Look for and complete additional task(s) during quiet periods, as required</p>

Additional Information about the unit

Unit purpose and aim(s)	This unit is about providing a reception service in a business environment, acting as the first point of contact between a business, its clients and the public.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)

Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	15

Title	Meet and welcome visitors	
CfA Unit No.	Q256	
WBA Unit No.	Y/601/2457	
Level	2	
Credit Value	3	
GLH	23	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand procedures for meeting and welcoming visitors	1.1. Describe different reasons for people visiting a business, their requirements and how their needs may be met 1.2 Explain the purpose of dealing with visitors promptly and courteously 1.3 Explain the purpose of presenting a positive image of self and the organisation 1.4 Explain the purpose of following health, safety and security procedures when dealing with visitors, including own responsibilities 1.5 Describe different types of problems that may occur with visitors including, conflict and aggression 1.6 Describe ways of dealing with different problems and when to refer them to an appropriate colleague 1.7 Explain the purpose of communicating with visitors 1.8 Describe organisation structures and communication channels within the organisation	
2. Be able to meet and welcome visitors	2.1 Greet visitor(s) and make them feel welcome 2.2 Identify visitors and the reason for their visit 2.3 Use the organisation's systems to receive and record visitors, as appropriate	

	<p>2.4 Make sure visitors' needs are met</p> <p>2.5 Present positive image of self and the organisation</p> <p>2.6 Follow health, safety and security procedures, as required</p> <p>2.7 Inform others of visitors' arrival, as required, in line with appropriate communication channels</p> <p>2.8 Deal with any problems that may occur, or refer problems to the appropriate person</p> <p>2.9 Follow procedures for departing visitors, as required</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit covers the procedures to follow and hospitality to offer when meeting and welcoming visitors to business premises.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	13

Title	Deliver, monitor and evaluate customer service to internal customers	
CfA Unit No.	Q328	
WBA Unit No.	A/601/2550	
Level	3	
Credit Value	3	
GLH	12	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the meaning of internal customer	1.1 Describe what is meant by internal customers	
2. Know the types of products and services relevant to internal customers	2.1 Describe the products and services offered by own organisation to internal customers	
3. Understand how to deliver customer service that meets or exceeds internal customer expectations	3.1 Explain the purpose and value of identifying internal customer needs and expectations 3.2 Explain why customer service must meet or exceed internal customer expectations 3.3 Explain the value of meeting or exceeding internal customer expectations 3.4 Explain the purpose and value of building positive working relationships	
4. Understand the purpose of quality standards and timescales for delivering customer service	4.1 Identify quality standards for own organisation and work 4.2 Explain the value of agreeing quality standards and timescales 4.3 Explain how to set and meet quality standards and timescales with internal customers	
5. Understand how to deal with internal customer service problems	5.1 Describe the types of problems that internal customers may have 5.2 Explain ways of dealing with problems 5.3 Explain the purpose and value of a complaints procedure, if applicable	
6. Understand how to monitor and	6.1 Explain the purpose and benefits	

evaluate internal customer service and the benefits of this	<p>of monitoring internal customer satisfaction and how to do so</p> <p>6.2 Describe techniques for collecting and evaluating customer feedback</p> <p>6.3 Explain the benefits of continuous improvement</p>
7. Be able to build positive working relationships with internal customers	<p>7.1 Identify internal customers</p> <p>7.2 Confirm internal customer needs in terms of products and services</p> <p>7.3 Confirm internal customer needs in terms of quality standards and timescales</p> <p>7.4 Agree procedures to be followed if internal customer needs are not met</p>
8. Be able to deliver customer services to agreed quality standards and timescales	<p>8.1 Provide customer service(s) to agreed quality standards</p> <p>8.2 Provide customer service(s) to agreed timescales</p> <p>8.3 Check internal customer needs and expectations have been met</p>
9. Be able to deal with internal customer service problems and complaints	<p>9.1 Follow procedures, within agreed timescale, to</p> <p>a) process problems and complaints</p> <p>b) resolve problems and complaints</p> <p>c) refer problems and complaints, where necessary</p>
10. Be able to monitor and evaluate customer services to internal customers	<p>10.1 Obtain and record internal customer feedback</p> <p>10.2 Analyse and evaluate internal customer feedback</p> <p>10.3 Take action that will lead to improvement in customer service(s) to internal customers</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about providing and continuously improving services to internal customers.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national	Council for Administration (CfA)

occupational standards or other professional standards or curricula (if appropriate)	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	12

Title	Deliver, monitor and evaluate customer service to external customers	
CfA Unit No.	Q329	
WBA Unit No.	F/601/2551	
Level	3	
Credit Value	3	
GLH	12	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the meaning of external customers	1.1 Describe what is meant by external customers	
2. Know the types of products and services relevant to external customers	2.1. Describe the products and services offered by the organisation to external customers	
3. Understand how to deliver customer service that meets or exceeds external customer expectations	3.1 Explain the purpose and value of identifying customer needs and expectations 3.2 Explain why customer service must meet or exceed customer expectations 3.3 Explain the value of meeting or exceeding customer expectations 3.4 Explain the purpose and value of building positive working relationships	
4. Understand the purpose of quality standards and timescales for customer service to external customers	4.1 Identify quality standards for own organisation and work 4.2 Explain the value of agreeing quality standards and timescales 4.3 Explain how to set and meet quality standards and timescales with external customers	
5. Understand how to deal with customer service problems for external customers	5.1 Describe the types of problems that external customers may have 5.2 Explain the consequences of not meeting external customer needs and expectations 5.3 Explain ways of dealing with external customer services problems	

	5.4 Explain the purpose and value of a complaints procedure
6. Understand how to monitor and evaluate external customer service and the benefits of this	6.1 Explain the purpose and benefits of monitoring external customer satisfaction and how to do so 6.2 Describe techniques for collecting and evaluating external customer feedback 6.3 Explain the benefits of continuous improvement
7. Be able to build positive working relationships with external customers	7.1 Identify external customers 7.2 Confirm external customer needs in terms of products and services 7.3 Confirm external customer needs in terms of quality standards and timescales 7.4 Agree procedures to be followed if external customer needs are not met
8. Be able to deliver external customer services to agreed quality standards and timescales	8.1 Provide external customer service(s) to agreed quality standards 8.2 Provide external customer service(s) to agreed timescales 8.3 Check external customer needs and expectations have been met
9. Be able to deal with customer service problems and complaints for external customers	9.1 Follow procedures, within agreed timescale, to a) process problems and complaints b) resolve problems and complaints c) refer problems and complaints, where necessary
10. Be able to monitor and evaluate services to external customers	10.1 Obtain and record external customer feedback 10.2 Analyse and evaluate external customer feedback 10.3 Take actions that will lead to improvement in service(s) to external customers

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about providing and

	continuously improving customer services to external customers.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	12

Title	Use customer service as a competitive tool	
CfA Unit No.		
WBA Unit No.	D/601/1228	
Level	3	
Credit Value	8	
GLH	53	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. organise customer service to gain a competitive advantage	1.1 develop their own and colleagues' understanding of the services and products offered by their organisation 1.2 define their organisation's service offer and the ways in which it compares with those of their competitors 1.3 set an example for colleagues and present an image to their customers that reinforces their organisation's service offer 1.4 encourage customer service actions that create and develop customer loyalty	
2. deliver a competitive service	2.1 take positive actions and encourage colleagues to take actions that provide individual customers with added value within their organisation's service offer 2.2 remind customers about their service offer and the extra benefit it provides over those of their competitors 2.3 offer additional technical advice to customers within their organisation's service offer 2.4 show awareness of the financial implications of any added value actions that they or their colleagues might offer 2.5 meet customer service targets to ensure that customers see the benefit of dealing with them	

	<p>rather than with a competitor</p> <p>2.6 re-direct customers to other service providers without offence when their expectations cannot be met by the organisation's service offer</p> <p>2.7 ensure that customers who have shown a previous interest in repeat and additional services are reminded of this</p> <p>2.8 encourage colleagues to offer complementary services and products when customer satisfaction indicates that customers would be interested in them</p>
<p>3. understand how to use customer service as a competitive tool</p>	<p>3.1 identify the factors that lead to customers' belief that they are enjoying value for money</p> <p>3.2 describe the services and products offered by their organisation</p> <p>3.3 describe the services and products offered by competitors</p> <p>3.4 identify the features and benefits of services and products that are seen by customers as added value</p> <p>3.5 explain the purpose of adding non-chargeable items to the service offer in order to impress customers and develop customer loyalty</p> <p>3.6 explain how to portray a positive image that reinforces their organisation's competitive position</p> <p>3.7 explain their organisation's customer service targets and cost implications of added value actions to improve the organisation's competitive position</p> <p>3.8 describe complementary services and products that may be of interest to their customers</p>

Additional Information about the unit	
Unit purpose and aim(s)	Customer service contributes to an organisation's competitive position. Customers of many organisations have choice about the services or products they use and who supplies them. Often the technical features and cost of the service or product are almost identical. If this is the case, the quality of the customer service offered makes all the difference about which supplier the customer chooses. This unit is about how the learner can play their part in ensuring that their organisation makes the best possible use of the competitive advantage that can be gained from offering superior customer service. It covers how the learner can use customer service as a tool to compete effectively with other providers of similar services and products. The unit is not for a learner whose organisation does not compete actively with others.
Unit expiry date	31/12/2014
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Specified in the Customer Service Assessment Strategy 2010
Support for the unit from an SSC or other appropriate body (if required)	This unit has been submitted on behalf of the Institute of Customer Service
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	City & Guilds - The City and Guilds of London Institute
Availability for use	Shared
Unit available from	01/02/2010
Unit guided learning hours	53

Title	Monitor and solve customer service problems	
CfA Unit No.		
WBA Unit No.	J/601/1515	
Level	3	
Credit Value	6	
GLH	40	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. solve immediate customer service problems	1.1 respond positively to customer service problems following organisational guidelines 1.2 solve customer service problems when they have sufficient authority 1.3 work with others to solve customer service problems 1.4 keep customers informed of the actions being taken 1.5 check with customers that they are comfortable with the actions being taken 1.6 solve problems with service systems and procedures that might affect customers before customers become aware of them 1.7 inform managers and colleagues of the steps taken to solve specific problems	
2. identify repeated customer service problems and options for solving them	2.1 identify repeated customer service problems 2.2 identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option 2.3 work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of the organisation	
3. take action to avoid the repetition of customer service problems	3.1 obtain the approval of somebody with sufficient authority to change organisational guidelines in order	

	<p>to reduce the chance of a problem being repeated</p> <p>3.2 action their agreed solution</p> <p>3.3 keep their customers informed in a positive and clear manner of steps being taken to solve any service problems</p> <p>3.4 monitor the changes they have made and adjust them if appropriate</p>
4. understand how to monitor and solve customer service problems	<p>4.1 describe organisational procedures and systems for dealing with customer service problems</p> <p>4.2 describe the organisational procedures and systems for identifying repeated customer service problems</p> <p>4.3 explain how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers</p> <p>4.4 explain how to negotiate with and reassure customers while their problems are being solved</p>

Additional Information about the unit

Unit purpose and aim(s)	<p>The learner's job involves delivering and organising excellent customer service. However good the service provided, some of their customers will experience problems and the learner will spot and solve other problems before their customers even know about them. This Unit is about the part of their job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems. Remember that some customers judge the quality of their customer service by the way that the learner solves customer service problems. The learner can impress customers and build customer loyalty by sorting out those</p>
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	problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.
Unit expiry date	31/12/2014
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Specified in the Customer Service Assessment Strategy 2010
Support for the unit from an SSC or other appropriate body (if required)	This unit has been submitted on behalf of the Institute of Customer Service
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	City & Guilds - The City and Guilds of London Institute
Availability for use	
Unit available from	01/02/2010
Unit guided learning hours	40

Manage Information and Data

Title	Organise and report data
CfA Unit No.	Q217
WBA Unit No.	R/601/2487
Level	2
Credit Value	3
GLH	12
Learning Outcomes	Assessment Criteria
The learner will	The learner can
1. Understand how to organise and report data that has been researched	1.1 Describe different ways of organising data that has been researched 1.2 Describe different ways of reporting data 1.3 Describe the purpose of presenting data to the agreed format and within the agreed timescale
2. Be able to organise data	2.1 Organise data so that it can be reported 2.2 Check the accuracy of the data, and make adjustments, if required 2.3 Obtain feedback on data collected, if required
3. Be able to report data	3.1 Present data in agreed format 3.2 Present data to agreed timescale

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about organising and reporting data to the agreed format and timescales.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the	15. Business, Administration and Law

subject/sector classification system	15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	9

Title	Research information	
CfA Unit No.	Q218	
WBA Unit No.	Y/601/2488	
Level	2	
Credit Value	4	
GLH	17	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand procedures for researching information	1.1 Give reasons for agreeing objectives and deadlines for researching information 1.2 Give reasons for identifying and agreeing sources of information 1.3 Explain the purpose of recording and storing information researched	
2. Be able to research information for others	2.1 Agree aims, objectives and deadlines for the information search 2.2 Identify sources of information 2.3 Search for and obtain data 2.4 Check that data is suitable for the purpose of the research 2.5 Record the data and store it securely 2.6 Make a record of information sources used 2.7 Meet deadlines for completing research	

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about organising suitable data that has been researched using different sources of information.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or	Council for Administration

other appropriate body (if required)	
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	17

Title	Store and retrieve information	
CfA Unit No.	Q219	
WBA Unit No.	R/601/2490	
Level	2	
Credit Value	3	
GLH	17	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand processes and procedures for storing and retrieving information	1.1 Explain the purpose of storing and retrieving required information 1.2 Describe different information systems and their main features 1.3 Explain the purpose of legal and organisational requirements for the security and confidentiality of information 1.4 Explain the purpose of confirming information to be stored and retrieved 1.5 Describe ways of checking information for accuracy 1.6 Explain the purpose of checking information for accuracy 1.7 Explain the purpose of providing information to agreed format and timescales 1.8 Describe the types of information that may be deleted 1.9 Describe problems that may occur with information systems and how to deal with them, when necessary	
2. Be able to store information	2.1 Identify, confirm and collect information to be stored 2.2 Follow legal and organisational procedures for security and confidentiality of information to be stored 2.3 Store information in approved locations 2.4 Check and update stored	

	<p>information, if required</p> <p>2.5 Delete stored information, if required</p> <p>2.6 Deal with, or refer problems, if required</p>
3. Be able to retrieve information	<p>3.1 Confirm and identify information to be retrieved</p> <p>3.2 Follow legal and organisational procedures for security and confidentiality of information</p> <p>3.3 Locate and retrieve the required information</p> <p>3.4 Check and update information, if required</p> <p>3.5 Provide information in the agreed format and timescale</p> <p>3.6 Deal with, or refer problems if required</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about storing and retrieving information securely and within confidentiality requirements of the organisation.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	17

Title	Archive information	
CfA Unit No.	Q220	
WBA Unit No.	Y/601/2491	
Level	2	
Credit Value	2	
GLH	13	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand procedures for archiving information	1.1 Explain why and when required information should be archived 1.2 Explain the purpose of agreeing retention periods for archiving information 1.3 Describe procedures to be followed for archiving information, including legal requirements, if required 1.4 Explain the purpose of organisational and legal requirements for the security and confidentiality of archived information 1.5 Explain the purpose of deciding and agreeing information to be archived 1.6 Describe procedures for recording and keeping archived information 1.7 Explain how to retrieve archived information 1.8 Describe how to delete information from an archive system 1.9 Describe problems that may occur with systems containing archived information and how to deal with them or refer them 1.10 Describe the purpose of conforming to requirements of an external archive system, if outsourced from the organisation	
2. Be able to archive information	2.1 Decide and agree the information to be archived, retrieved and	

	<p>deleted</p> <p>2.2 Decide and agree on the retention period for information being archived</p> <p>2.3 Follow legal and organisational policies and procedures for security and confidentiality of information</p> <p>2.4 Archive information to the agreed brief and timescale</p> <p>2.5 Maintain and update a record of information archived</p> <p>2.6 Resolve or refer problems, if required</p> <p>2.7 Retrieve archived information on request</p> <p>2.8 Delete archived information, if required</p> <p>2.9 Conform to requirements of external archive systems, if outsourced from the organisation</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about deciding and agreeing the information to be archived and deleted within a business environment, including, working with external archive systems if this function is outsourced from an organisation.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	13

Title	Support the management and development of an information system	
CfA Unit No.	Q228	
WBA Unit No.	J/601/2518	
Level	2	
Credit Value	7	
GLH	40	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to contribute to the management of an information system	1.1 Explain the purpose of managing information to meet requirements 1.2 Explain the purpose and value of supporting training for users and giving or requesting on-going support 1.3 Explain the purpose of complying with legal and organisation requirements when using an information system 1.4 Explain the purpose of contributing to the monitoring of an information system in use 1.5 Explain the purpose of contributing to the maintenance and updating of an information system 1.6 Describe ways of contributing to the maintenance and updating of an information system 1.7 Describe the types of problems that may occur with an information system and how to deal with them	
2. Understand how to contribute to the review and further development of an information system	2.1 Explain the purpose and value of contributing to the continuous improvement of an information system 2.2 Explain how to identify problems in an information system and report them 2.3 Describe ways of contributing to the resolution of problems in an information system	

<p>3. Be able to contribute to the management of an information system</p>	<p>3.1 Contribute to training on the use of an information system</p> <p>3.2 Contribute to supporting users, if required</p> <p>3.3 Monitor own use of an information system</p> <p>3.4 Confirm legal and organisational requirements for handling information are followed</p> <p>3.5 Make sure a system is maintained and updated, within limits of own authority</p> <p>3.6 Identify and report problems when they occur</p> <p>3.7 Resolve problems within limits of own authority</p>
<p>4. Be able to contribute to the evaluation of an information system</p>	<p>4.1 Provide feedback on performance of an information system</p> <p>4.2 Contribute to the evaluation of feedback and prioritising of development needs, if required</p> <p>4.3 Contribute information to enable further system development</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about supporting the management and evaluation of an information system to meet identified needs in a business environment.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	40

Title	Support the design and development of an information system		
CfA Unit No.	Q316		
WBA Unit No.	L/601/2536		
Level	3		
Credit Value	7		
GLH	35		
Learning Outcomes		Assessment Criteria	
The learner will		The learner can	
1. Understand the purpose of supporting the design and development of an information system		1.1 Explain the purpose and value of contributing to the design and development of an information system 1.2 Describe ways of contributing to the design and development of an information system	
2. Understand how to contribute to the design and development of an information system		2.1 Explain the purpose and value of contributing own user needs for an information system 2.2 Explain the benefits of developing a system specification based on user needs 2.3 Describe ways of contributing to the creation, design and development of an information system 2.4 Explain the purpose and value of contributing to the testing of an information system during design and development	
3. Be able to contribute to the design and development of an information system		3.1 Identify and agree the information to be managed 3.2 Contribute to the design and development of an information system to meet agreed specification requirements 3.3 Support system testing 3.4 Identify and report faults 3.5 Remedy faults, within limits of own authority	

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about contributing to the

	design and development of an information system that will meet identified needs in a business environment.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	35

Title	Monitor information systems	
CfA Unit No.	Q317	
WBA Unit No.	R/601/2537	
Level	3	
Credit Value	7	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to monitor an information system	1.1 Explain the purpose and benefits of managing information to meet requirements 1.2 Explain the purpose and benefits of providing training and on-going support to users 1.3 Explain the purpose of complying with legal and organisational requirements when using an information system 1.4 Explain the purpose and benefits of monitoring use of an information system 1.5 Describe ways of monitoring use of an information system 1.6 Explain the purpose and benefits of maintaining and updating an information system 1.7 Describe ways of maintaining and updating an information system 1.8 Describe the types of problems that may occur with an information system and how to deal with them	
2. Understand how to review and further develop an information system	2.1 Explain the purpose and benefits of continuously improving an information system 2.2 Explain how to identify problems in an information system and analyse them 2.3 Describe ways of resolving problems in an information system	
3. Be able to monitor an information	3.1 Identify the information to be monitored and the resources	

system	<p>available to do so</p> <p>3.2 Contribute to designing a system specification</p> <p>3.3 Provide training on the use of an information system</p> <p>3.4 Provide on-going support to users</p> <p>3.5 Monitor use of an information system</p> <p>3.6 Make sure legal and organisational requirements for handling information are followed</p> <p>3.7 Make sure a system is maintained and updated, if required</p> <p>3.8 Identify, analyse and resolve problems when they occur</p> <p>3.9 Collect feedback on performance of an information system</p> <p>3.10 Provide information to enable further system development to meet agreed specifications</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about monitoring and evaluating an information system to meet identified needs in a business environment.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	30

Title	Analyse and report data
CfA Unit No.	Q318
WBA Unit No.	Y/601/2538
Level	3
Credit Value	6
GLH	30
Learning Outcomes	Assessment Criteria
The learner will	The learner can
1. Understand how to organise and evaluate data that has been researched	<p>1.1 Describe purpose and benefits of organising data so that it can be analysed</p> <p>1.2 Explain how to evaluate the relevance, validity and reliability of data</p> <p>1.3 Explain how to analyse and prepare researched data so results will be accurate and free from bias</p> <p>1.4 Explain the differences between primary and secondary research methods</p> <p>1.5 Explain the differences between quantitative and qualitative research methods</p> <p>1.6 Describe how to search for relevant data sources</p>
2. Understand how to report data that has been researched	<p>2.1 Describe ways of reporting data so that it</p> <p>a) meets agreed aims and objectives</p> <p>b) is accurate and free from bias</p>
3. Be able to analyse and evaluate data	<p>3.1 Organise data so that it can be analysed and reported</p> <p>3.2 Select relevant, valid and reliable data to analyse</p> <p>3.3 Apply analysis and evaluation techniques, as required</p> <p>3.4 Review data to produce accurate, unbiased results and conclusions</p> <p>3.5 Check the accuracy of the analysis, and make adjustments, if required</p>

	3.6 Obtain feedback on data analysis, if required
4. Be able to report data	4.1 Present data in agreed format 4.2 Present data to agreed timescale

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about analysing and reporting data that meets the aims and objectives of the research.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	30

Title	Design and develop an information system	
CfA Unit No.	Q410	
WBA Unit No.	T/601/2563	
Level	4	
Credit Value	7	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose of information systems in a business environment	1.1 Evaluate the types of information that need to be managed in a business environment 1.2 Analyse the types of information systems available and their main features	
2. Understand how to design and develop an information system	2.1 Analyse the purpose and benefits of identifying and agreeing user needs for an information system 2.2 Explain the purpose and benefits of developing a system specification based on agreed needs 2.3 Analyse ways of developing a specification for an information system 2.4 Analyse ways of creating and developing an information system based on agreed needs 2.5 Explain the purpose and benefits of testing an information system during development	
3. Be able to design and develop an information system	3.1 Identify and analyse the information to be managed 3.2 Identify the resources available 3.3 Develop a system specification within agreed budget, as required 3.4 Develop an information system that meets the specification 3.5 Test the system 3.6 Identify, report and remedy faults	

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about designing and

	developing an information system that will meet identified needs in a business environment.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	30

Title	Manage and evaluate an information system	
CfA Unit No.	Q411	
WBA Unit No.	A/601/2564	
Level	4	
Credit Value	6	
GLH	20	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to manage an information system	1.1 Analyse how to plan and agree implementation of the information system 1.2 Analyse the purpose and benefits of managing information to meet requirements 1.3 Explain the purpose and benefits of providing training to users and providing on-going support 1.4 Explain the purpose of complying with legal and organisation requirements when using an information system 1.5 Explain the purpose and benefits of monitoring use of an information system 1.6 Analyse ways of monitoring use of an information system 1.7 Explain the purpose and benefits of maintaining and updating an information system 1.8 Analyse ways of maintaining and updating an information system 1.9 Analyse the types of problems that may occur with an information system and how to deal with them	
2. Understand how to review and further develop an information system	2.1 Explain the purpose and benefits of continuously improving an information system 2.2 Analyse ways of evaluating an information system 2.3 Explain how to identify problems in an information system and analyse them	

	2.4 Analyse ways of resolving problems in an information system
3. Be able to manage an information system	<p>3.1 Provide training on the use of an information system</p> <p>3.2 Provide on-going support to users</p> <p>3.3 Monitor use of, accuracy and productivity of an information system to meet organisational requirements</p> <p>3.4 Make sure legal and organisational requirements for handling information are followed</p> <p>3.5 Make sure an information system is maintained and updated, if required</p> <p>3.6 Identify, analyse and resolve problems when they occur</p>
4. Be able to evaluate an information system	<p>4.1 Collect feedback on performance of an information system</p> <p>4.2 Evaluate feedback and prioritise development needs of an information system, if required</p> <p>4.3 Provide information to enable further information system development</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about managing and evaluating an information system that meets identified needs in a business environment. The learner will use knowledge of needs, to work in collaboration with others as required, to manage and evaluate the system
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration

Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	20

Business Resources

Title	Use office equipment	
CfA Unit No.	Q221	
WBA Unit No.	H/601/2493	
Level	2	
Credit Value	4	
GLH	18	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Know about different types of office equipment and its uses	1.1 Identify different types of equipment and their uses 1.2 Describe the different features of different types of office equipment 1.3 Explain why different types of equipment are chosen for tasks	
2. Understand the purpose of following instructions and health and safety procedures	2.1 Explain the purpose of following manufacturer's instructions when using equipment 2.2 Explain the purpose of following organisational instructions when using equipment 2.3 Identify health and safety procedures for using different types of equipment 2.4 Explain the purpose of following health and safety procedures when using equipment 2.5 Explain the purpose of keeping equipment clean and hygienic	
3. Understand how to use equipment in a way that minimises waste	3.1 Give examples of waste when using equipment 3.2 Give examples of ways to reduce waste 3.3 Explain the purpose of minimising waste	
4. Know about the different types of problems that may occur when using equipment and how to deal with them	4.1 Give examples of equipment problems 4.2 Explain the purpose of following manufacturer's instructions and organisational procedures when dealing with problems	

	4.3 Give examples of how to deal with problems
5. Understand the purpose of meeting work standards and deadlines	5.1 Explain the purpose of meeting work standards and deadlines when using equipment
6. Understand the purpose of leaving equipment and the work area ready for the next user	6.1 Explain the purpose of leaving equipment and the work area ready for the next user
7. Be able to use office equipment	<p>7.1 Locate and select equipment needed for a task</p> <p>7.2 Use equipment following manufacturer's and organisational guidelines</p> <p>7.3 Use equipment minimising waste</p> <p>7.4 Keep equipment clean and hygienic</p> <p>7.5 Deal with equipment problems following manufacturer's and organisational procedures</p> <p>7.6 Refer problems, if required</p> <p>7.7 Make sure final work product meets agreed requirements</p> <p>7.8 Make sure that product is delivered to agreed timescale</p> <p>7.9 Make sure equipment, resources and work area are ready for the next user</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about using a variety of different office equipment following manufacturer's and organisational guidelines.
Unit expiry date	31 December 2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration (CfA)
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	18

Title	Maintain and issue stationery stock items
CfA Unit No.	Q222
WBA Unit No.	M/601/2495
Level	2
Credit Value	3
GLH	14
Learning Outcomes	Assessment Criteria
The learner will	The learner can
1. Understand procedures for maintaining and issuing stationery stock items	<p>1.1 Outline organisational requirements for ordering, taking delivery, storing, stock-taking, issuing and disposing of stationery stock items</p> <p>1.2 Outline ways of keeping up-to-date, accurate and legible records of stationery stock items</p> <p>1.3. Explain the purpose of knowing the level of demand for stationery stock items and how this may affect requirements for ordering and stock held</p> <p>1.4 Outline other factors that may affect the future level of demand for stationery stock held</p> <p>1.5 Give examples of suppliers that may be used when ordering stationery stock items</p> <p>1.6 Outline differences between ordering stationery stock items from internal and external suppliers</p> <p>1.7 Outline organisational procedures for issuing stationery stock items</p> <p>1.8 Outline when it may be necessary to ask for receipts for stationery stock items issued</p>
2. Know how to handle, store and dispose of stationery stock items	<p>2.1 Outline organisational procedures for handling and storing stationery stock items safely and securely</p> <p>2.2 Outline organisational procedures for the correct and safe disposal of stationery stock items</p>

<p>3. Understand problems that may occur with maintaining and issuing stationery stock items and how to deal with them</p>	<p>3.1 Describe types of problems that may occur with deliveries and stationery stock items</p> <p>3.2 Describe organisational procedures for dealing with problems</p>
<p>4. Understand how to make recommendations for improving stationery stock handling</p>	<p>4.1 Describe organisational procedures for recommending improvements for ordering, taking delivery, storing, stock-taking, issuing and disposing of unwanted or damaged stationery stock items</p>
<p>5. Be able to maintain stationery stock levels</p>	<p>5.1 Maintain stationery stock items to required levels</p> <p>5.2 Handle and store stationery stock safely and securely, maintaining its condition and following organisational procedures</p> <p>5.3 Carry out stock-takes as instructed and report problems</p> <p>5.4 Order stationery stock from suppliers within limits of own authority</p> <p>5.5 Chase up orders with suppliers</p> <p>5.6 Check incoming deliveries against orders and report any problems</p> <p>5.7 Keep up-to-date, accurate and legible records of stationery stock delivered and held</p>
<p>6. Be able to issue items from stationery stock</p>	<p>6.1 Issue stationery stock items as requested, following organisational procedures</p> <p>6.2 Keep up-to-date, accurate and legible records of stationery stock items issued</p>
<p>7. Be able to deal with unwanted or damaged items of stationery stock</p>	<p>7.1 Dispose of unwanted or damaged stationery stock items safely, following organisational procedures and legal requirements</p>
<p>8. Be able to make recommendations to improve stationery stock handling</p>	<p>8.1 Identify and recommend ways in which systems for receiving, issuing and disposing of stationery stock could be</p>

	improved, as required
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about the procedures involved in keeping a stock of business items that will be used in a business environment in order to complete the day to day work of the organisation.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	CfA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	14

Title	Order products and services	
CfA Unit No.	Q319	
WBA Unit No.	D/601/2539	
Level	3	
Credit Value	5	
GLH	35	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to identify, select and negotiate the supply of products and services	1.1 Identify different sources of information on products and services for an organisation 1.2 Explain how to use different sources of information on products and services 1.3 Describe how to write a specification for a product or service 1.4 Identify sources of products and services that meet the quality expectations of an organisation 1.5 Explain the purpose of selecting products and services that represent best value for money 1.6 Describe how to negotiate best value for money 1.7 Explain the purpose of developing and maintaining good relationships with suppliers, and ways of doing so 1.8 Describe a supply chain and how it works	
2. Understand organisational requirements and policies for the ordering and supply of products and services	2.1 Describe the procedures for the ordering and supply of products and services for an organisation 2.2 Describe the needs and priorities for the ordering and supply of products and services for an organisation 2.3 Explain the purpose of having organisational policies for the acceptance of gifts and hospitality	
3. Understand how to monitor, evaluate and improve procedures	3.1 Explain the purpose of monitoring and evaluating procedures for the	

<p>for the ordering and supply of products and services</p>	<p>ordering and supply of products and services, and ways of doing so</p> <p>3.2 Describe actions that may be taken to improve efficiency in the ordering and supply of products and services</p> <p>3.3 Describe ways of getting better value for money for products and services provided</p>
<p>4. Be able to follow organisational procedures for the ordering and supply of products and services</p>	<p>4.1 Use available information to keep up to date with products and services in own area of work</p> <p>4.2 Agree a budget and specification for products or services to be ordered</p> <p>4.3 Identify sources of products and services that meet the quality specification(s) of the organisation</p> <p>4.4 Select the product or service which represents best value for money</p> <p>4.5 Procure product(s) or service(s) following organisational procedures</p> <p>4.6 Negotiate with selected supplier(s) to reach an agreement which offers good value for money and which is acceptable to both parties, within limits of own authority</p> <p>4.7 Agree a contract for the supply of product(s) or service(s), within limits of own authority</p>
<p>5. Be able to maintain relationships with suppliers of products and services and deal with problems</p>	<p>5.1 Take actions to create and maintain partnerships with suppliers to improve quality and cut costs, within limits of own authority</p> <p>5.2 Monitor the performance of suppliers in line with the terms of the contract</p> <p>5.3 Deal with problems as they occur, seeking support from others, where necessary</p>

<p>6. Be able to monitor, evaluate and make recommendations to improve the ordering and supply of products and services</p>	<p>6.1 Monitor the ordering and supply of products and services for effectiveness and efficiency</p> <p>6.2 Evaluate the ordering and supply of products and services and identify areas for improvement</p> <p>6.3 Suggest ways to improve effectiveness and efficiency and obtain better value for money for the supply of products and services</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about the ordering and supply of products and services for an organisation, ensuring that the products and services supplied meet the needs of the organisation and represent the best value for money.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	CfA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	35

Title	Agree a budget	
CfA Unit No.	Q330	
WBA Unit No.	J/601/2552	
Level	3	
Credit Value	4	
GLH	25	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to develop budgets	1.1 Explain how to use estimations when developing a draft budget 1.2 Explain how to identify priorities and financial resources needed when preparing a budget 1.3 Explain the purpose and benefits of identifying priorities when preparing a budget 1.4 Explain the purpose and benefits of evaluating and justifying estimated costs and income 1.5 Describe procedures for negotiating superseded budgets 1.6 Describe skills needed for agreeing budgets	
2. Be able to agree a budget	2.1 Identify financial resources needed to achieve goals and objectives for agreeing a budget 2.2 Evaluate and justify costs and risks 2.3 Prepare a draft budget 2.4 Negotiate and agree a budget	

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about developing and agreeing a budget for a department or section within a business.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or	Assessment Strategy

regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	CfA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	25

Title	Manage budgets	
CfA Unit No.	Q421	
WBA Unit No.	T/601/2580	
Level	4	
Credit Value	5	
GLH	29	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose of budgets	1.1 Explain the purpose and benefits of managing financial resources effectively and efficiently 1.2 Identify legal, regulatory and organisational requirements for managing a budget 1.3 Describe different types of budgetary systems and their features	
2. Understand how to manage budgets	2.1 Describe methods for monitoring, controlling and recording income and expenditure 2.2 Describe ways in which costs may be minimised in own area of responsibility 2.3 Identify situations in which corrective action may be needed 2.4 Describe the scope of own authority for managing a budget and authorising expenditure	
3. Understand how to report performance against budgets	3.1 Explain the purpose and benefits of reporting information on performance against budget 3.2 Explain how to check the accuracy of budget calculations 3.3 Explain the purpose and benefits of recording information that will help with the future preparation of budgets	
4. Be able to manage budgets	4.1 Control budget performance within limits and deadlines 4.2 Analyse and take action to minimise costs where possible 4.3 Take corrective action to make	

	<p>sure of best value for money</p> <p>4.4 Authorise expenditure within the scope of own authority</p>
5. Be able to monitor budgets	<p>5.1 Record transactions, as required</p> <p>5.2 Produce information on performance against budget, when required</p> <p>5.3 Make sure all calculations are accurate</p> <p>5.4 Record information that will help with the preparation of future budgets</p>

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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about managing and monitoring a budget for a department or section within an organisation.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	CfA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	29

Innovation and Change

Title	Respond to change in a business environment	
CfA Unit No.	Q227	
WBA Unit No.	F/601/2517	
Level	2	
Credit Value	3	
GLH	16	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the causes and effects of change in a business environment	1.1 Give examples of changes in working practices in a business environment, and explain why they are happening 1.2 Describe the possible effects of changes in working practices on people within a business environment 1.3 Explain how change can benefit an organisation, team and individual	
2. Understand own role in supporting change	2.1 Describe ways in which individuals can support change in a business environment 2.2 Explain the purpose and benefits of contributing to planning for change 2.3 Explain how individuals can prepare for changes within a business environment and in ways of working 2.4 Describe the types of support that people need during change 2.5 Explain the benefits of good communication with others and accurate information during change 2.6 Describe how to identify the effects of changes on own work and reasons for doing so 2.7 Explain the purpose of reviewing the effects of changes on people, processes and outcomes	

	2.8 Describe ways of reviewing the effects of changes on people, processes and outcomes
3. Understand own role in responding to change	3.1 Explain the purpose of change as part of a process of continuous improvement 3.2 Explain the possible effects of changes on own values 3.3 Explain the benefits of responding positively to changes
4. Be able to respond to change	4.1 Identify changes needed in own area of work 4.2 Make suggestions for change 4.3 Complete own work tasks using changed procedures or ways of working 4.4 Identify where training or other support is needed 4.5 Actively seek support, as required 4.6 Give support to other people during change, or seek support, as required 4.7 Ask questions to clarify issues
5. Be able to support the evaluation of change	5.1 Give feedback on the effects of changes in own work 5.2 Make suggestions for further actions, as required

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about recognising the affects of changes in workplace activities and the people who carry them out.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting	CfA

the unit	
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	16

Title	Contribute to innovation in a business environment	
CfA Unit No.	Q326	
WBA Unit No.	A/601/2547	
Level	3	
Credit Value	4	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose and benefits of innovation in a business environment	1.1 Explain the purpose of innovation as a way of staying competitive and offering new solutions 1.2 Explain the purpose of questioning existing ways of working in own area of work and assumptions about them	
2. Understand how to contribute to research, develop and review ideas for new approaches and solutions	2.1 Explain the purpose of reviewing existing working methods, products or services 2.2 Explain ways of reviewing existing working methods, products or services 2.3 Identify sources of information for new approaches and solutions 2.4 Describe ways of collecting information on possible improvements 2.5 Explain the purpose of working with others when developing new approaches and solutions 2.6 Explain the benefits of working with others when agreeing how to present ideas to decision-makers, and ways of doing so 2.7 Explain how to work with others to develop and agree an idea 2.8 Explain how to decide when an idea is, or is not possible 2.9 Explain the purpose of reviewing and learning from mistakes	
3. Understand how to present suggestions for new approaches and solutions	3.1 Explain the purpose of selling ideas to decision-makers 3.2 Describe how to present and sell	

	suggestions for new approaches and solutions to decision-makers to achieve a positive outcome
4. Be able to contribute to research and develop ideas	<p>4.1 Question constructively existing ways of working in own area of responsibility</p> <p>4.2 Contribute to researching and identifying possible improvements to working methods, products or services in own area of responsibility</p> <p>4.3 Contribute to the collection of information that can be used to develop ideas for new approaches and solutions</p> <p>4.4 Agree criteria for evaluating ideas including fit with organisational aims and objectives</p>
5. Be able to present suggestion for new approaches and solutions	<p>5.1 Present and sell suggestions for new approaches and /or solutions</p> <p>5.2 Communicate risks to others in a suitable format</p>
6. Be able to evaluate, review and make suggestions for new approaches and solutions	<p>6.1 Contribute to the evaluation of ideas for new approaches and solutions using</p> <ul style="list-style-type: none"> a) fit with organisational aims and objectives b) other agreed criteria <p>6.2 Evaluate ideas to challenge own assumptions and thinking about ways of working, products or services</p> <p>6.3 Contribute to the selling of ideas to others</p> <p>6.4 Seek feedback on ideas, analyse feedback, and show a willingness to compromise</p> <p>6.5 Contribute to the assessment of idea(s) and decide whether a suggestion for a new approach / solution is possible</p>

Additional Information about the unit

Unit purpose and aim(s)	This unit is about making contributions to improving ways of working, products or services, by
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	questioning, researching and actively developing ideas for new ways of working, products or services which can then be put forward as suggestions to decision-makers.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	30

Title	Contribute to innovation in a business environment	
CfA Unit No.	Q418	
WBA Unit No.	K/601/2575	
Level	4	
Credit Value	6	
GLH	25	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose and benefits of innovation in a business environment	1.1 Evaluate the purpose of innovation as a way of staying competitive and offering new solutions 1.2 Explain the purpose of questioning existing ways of working and assumptions about them	
2. Understand how to research, develop and review ideas for new approaches and solutions	2.1 Explain the purpose of reviewing existing products and services, and ways of doing so 2.2 Evaluate ways of reviewing existing products and services 2.3 Identify sources of information for new approaches and solutions 2.4 Describe ways of collecting information on possible improvements 2.5 Explain the purpose of working with others when developing new approaches and solutions 2.6 Explain the purpose and benefits of working with others when agreeing how to present ideas to decision-makers 2.7 Evaluate how to work with others to develop and agree an idea 2.8 Explain the purpose and benefits of acknowledging contributions made by others 2.9 Explain how to evaluate ideas, including cost / benefit and impact analysis 2.10 Explain how to question assumptions to develop	

	<p>concepts and propositions</p> <p>2.11 Explain the purpose of reviewing and learning from mistakes</p>
<p>3. Understand how to present suggestions for new approaches and solutions</p>	<p>3.1 Explain the purpose of selling ideas to decision-makers</p> <p>3.2 Analyse how to present and sell suggestions for new approaches and solutions to decision-makers to achieve a positive outcome</p> <p>3.3 Explain the purpose of risk analysis</p> <p>3.4 Explain when it is appropriate to take 'acceptable' risks</p> <p>3.5 Evaluate the purpose and benefits of accepting feedback</p> <p>3.6 Explain how to develop and document proposals for change</p>
<p>4. Be able to research and develop ideas for new approaches and solution</p>	<p>4.1 Question constructively existing ways of working in own area of responsibility</p> <p>4.2 Research and identify possible improvements to working methods, services or products in own area of responsibility</p> <p>4.3 Collect information that can be used to develop ideas for new approaches and solutions</p> <p>4.4 Carry out a risk analysis</p> <p>4.5 Agree criteria for evaluating ideas including fit with organisational aims and objectives</p>
<p>5. Be able to present suggestions for new approaches and solutions</p>	<p>5.1 Put forward a formal proposal of new approaches and / or solutions</p> <p>5.2 Communicate risks to others in a suitable format</p>
<p>6. Be able to evaluate, review and make suggestions for new approaches and solutions</p>	<p>6.1 Identify the cost and benefits of new ideas to include</p> <ul style="list-style-type: none"> a) resources required b) assessment of impact on others <p>6.2 Evaluate ideas for new approaches and solutions using</p> <ul style="list-style-type: none"> a) fit with organisational aims

	<p>and objectives</p> <p>b) other agreed criteria</p> <p>6.3 Evaluate ideas to challenge own assumptions and thinking about ways of working</p> <p>6.4 Put forward a formal proposal to persuade decision-makers of the benefits of your idea(s)</p> <p>6.5 Communicate and sell ideas to others</p> <p>6.6 Seek feedback on ideas, analyse feedback, and show a willingness to adapt</p> <p>6.7 Assess idea(s) and decide whether a suggestion for a new approach / solution is possible</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about identifying and evaluating new ideas for innovation in the business environment.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	25

Title	Plan change for a team	
CfA Unit No.	Q419	
WBA Unit No.	M/601/2576	
Level	4	
Credit Value	6	
GLH	22	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose and value of planning change	1.1 Explain the purpose and benefits of planning change for a team to organisations, individuals and a team	
2. Understand the role of the team and individuals in planning change	2.1 Explain the purpose and benefits of engaging the team and individuals in planning change 2.2 Explain the purpose and benefits of encouraging the team and individuals to feel that they are making contributions to planning change 2.3 Explain the purpose and benefits of using a team and individuals to challenge ways of working constructively and creatively when planning change	
3. Understand the purpose and value of communication when planning change	3.1 Explain the purpose and benefits of having goals for changes in a team and communicating them to those involved 3.2 Explain the purpose and benefits of making sure decision-makers are committed to planned changes	
4. Understand the purpose and value of negotiation and dealing with problems when planning change	4.1 Explain the purpose and benefits of being adaptable during change planning and the change process 4.2 Explain the purpose and benefits of being able to renegotiate plans for changes 4.3 Analyse the types of problems and risks that may occur while planning change 4.4 Explain ways of responding to	

	<p>problems while planning change</p> <p>4.5 Explain the purpose and benefits of dealing with problems when planning change</p>
5. Be able to identify and develop opportunities for change for a team	<p>5.1 Recognise opportunities for change for a team</p> <p>5.2 Review options for change in terms of the constraints, risks, benefits, costs and implications for a team</p> <p>5.3 Identify the risks and benefits for a team associated with options for change</p> <p>5.4 Persuade the team to commit itself to change</p>
6. Be able to plan change for a team	<p>6.1 Encourage individuals and the team to challenge existing ways of working and put forward new ideas</p> <p>6.2 Plan change for a team identifying vision, goals, objectives, timescales and resources</p> <p>6.3 Agree plans for change with relevant decision-makers, as required</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about planning changes across teams in a department or part of an organisation at the level of a departmental manager or director.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	22

Specialised Business Support Services - Human Resources

Title	Administer human resource records	
CfA Unit No.		
WBA Unit No.	T/601/2790	
Level	2	
Credit Value	3	
GLH	20	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to create personnel files for new starters	1.1 Describe the systems, procedures and software used by the organisation for administering Human Resource records 1.2 Describe the information that should be entered in a new personnel file	
2. Understand how to maintain Human Resource information	2.1 Explain how to enter and update Human Resource information in a personnel file 2.2 Describe the Human Resource information that should be held for members of staff 2.3 Explain the action that should be taken if Human Resource information is incomplete	
3. Understand how to report Human Resource information	3.1 Describe the types of Human Resource reports that may be requested 3.2 Explain how to produce reports from individual or multiple Human Resource files	
4. Understand the organisational and legal requirements for administering Human Resource records	4.1 Describe the current legislation that applies when dealing with Human Resource records 4.2 Clarify the limits and scope of responsibilities and authority in administering HR records 4.3 Describe the data protection principles that apply to HR records 4.4 Explain organisation procedures	

	<p>for confidentiality of HR records</p> <p>4.5 Explain organisation procedures for security of HR records</p> <p>4.6 Explain the purpose of confidentiality and security of HR information</p> <p>4.7 Describe the potential consequences of a breach of confidentiality or security</p> <p>4.8 Explain organisation policy and procedure for removal of out of date HR information</p> <p>4.9 Explain organisation policy and procedure for archiving HR information</p>
5. Be able to create personnel files for new starters	<p>5.1 Open a new personnel file</p> <p>5.2 Record required information about employee</p> <p>5.3 File relevant employee documents</p> <p>5.4 Process monitoring data, as appropriate</p> <p>5.5 Check that information is complete, requesting missing information where necessary</p>
6. Be able to maintain Human Resource information	<p>6.1 Keep required personnel information up to date</p> <p>6.2 Maintain records of personnel information</p> <p>6.3 Process and file relevant correspondence and documentation</p>
7. Be able to report Human Resource information	<p>7.1 Provide information from individual personnel files as requested</p> <p>7.2 Provide management information reports as requested</p>
8. Be able to comply with organisational and legal requirements	<p>8.1 Comply with organisational and legal requirements for confidentiality, freedom of information, data protection and security of information</p> <p>8.2 Remove out of date information in line with organisational policy and procedures</p>

	8.3 Archive relevant information in line with current legislation and organisational policy and procedures
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Additional Information about the unit	
Unit purpose and aim(s)	This unit covers the knowledge and understanding learners need to administer Human Resource records. It also covers the practical application of this knowledge and understanding.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	HR Admin Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	The Council for Administration (CfA) who are the SSB responsible for developing the unit as recognised by Ofqual
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	CfA - Council for Administration (Unit Submitter and Rules of Combination Developer)
Availability for use	
Unit available from	01/03/2010
Unit guided learning hours	20

Title	Administer the recruitment and selection process	
CfA Unit No.		
WBA Unit No.	A/601/2791	
Level	2	
Credit Value	3	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to advertise job vacancies	1.1 Explain organisational policies, procedures and constraints that affect the area of responsibility 1.2 Explain the procedures to identify and process personnel requirements in the organisation 1.3 Explain ways in which personnel requirements are expressed in job descriptions and persons specifications 1.4 Explain how to interpret personnel requirements in job descriptions and persons specifications 1.5 Describe the current legislation, that applies when dealing with recruitment and selection 1.6 Clarify the limits and scope of their responsibilities and authority in administering the recruitment and selection process 1.7 Describe the types of information to include in a job advertisement 1.8 Explain the legal/organisational requirements that affect the type of information in the job advertisement 1.9 Explain how to place advertisements in different locations 1.10 Explain how to liaise with recruitment agencies	
2. Understand how to respond to potential applicants	2.1 Describe the type of information that should be in an application pack	

	<p>2.2 Describe the types of queries that applicants may have</p> <p>2.3 Explain how to respond to the queries that applicants may have</p> <p>2.4 Explain how to keep records of responses received</p> <p>2.5 Clarify the purpose of keeping records of responses received</p>
<p>3. Understand how to administer the selection process</p>	<p>3.1 Describe organisational procedures used to shortlist the applicants</p> <p>3.2 Describe the procedures and methods for contacting shortlisted candidates to invite them to participate in the selection process</p> <p>3.3 Explain how to process feedback for unsuccessful applicants</p> <p>3.4 Describe the different types of selection processes that may be used and how they work</p> <p>3.5 Clarify the selection processes used in the organisation and their role in those</p> <p>3.6 Explain the administrative support needed for different types of selection processes</p> <p>3.7 Explain the procedures for obtaining the resources needed for the selection process</p> <p>3.7 Describe the range of documentation that is used for selection by their organisation</p> <p>3.8 Clarify the purpose of giving candidates a favourable impression of the organisation</p> <p>3.9 Describe the range of records that must be kept following the selection process</p> <p>3.10 Explain the purpose of following organisational procedures for keeping records following the selection process</p>
<p>4. Understand how to administer the appointment process</p>	<p>4.1 Describe the range of pre-employment checks</p>

	<p>4.2 Explain how to carry out pre-employment checks</p> <p>4.3 Explain how to format offer letters and employment contracts</p> <p>4.4 Explain the purpose of confidentiality and security of record keeping</p>
5. Be able to advertise job vacancies	<p>5.1 Confirm the personnel requirements with the responsible person</p> <p>5.2 Confirm the information that will appear in the job advertisement</p> <p>5.3 Confirm how the vacancy will be advertised</p> <p>5.4 Advertise the vacancy as agreed</p> <p>5.5 Liaise with relevant agencies to confirm details of job vacancies</p> <p>5.6 Liaise with the relevant agencies to make sure they understand the requirements of the organisation</p>
6. Be able to respond to potential applicants	<p>6.1 Send out application packs or other information to potential applicants</p> <p>6.2 Respond appropriately to queries from potential applicants</p> <p>6.3 Maintain records of responses received</p>
7. Be able to administer the selection process	<p>7.1 Collate applications and make available to those involved in the selection</p> <p>7.2 Invite shortlisted candidates to take part in the selection process</p> <p>7.3 Process feedback to unsuccessful applicants</p> <p>7.4 Keep records of responses from shortlisted candidates</p> <p>7.5 Provide appropriate support for the selection process</p> <p>7.6 Help to make sure candidates have a positive impression of the organisation</p> <p>7.7 Keep records of the outcomes of the selection process</p>
8. Be able to administer the	8.1 Carry out appropriate pre-

appointment process	<p>employment checks</p> <p>8.2 Format and send out offer letters and employment contracts</p> <p>8.3 Maintain records of the recruitment and selection process in line with current legislation and organisational requirements</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit covers the knowledge and understanding learners need to administer the recruitment and selection process. It also covers the practical application of this knowledge and understanding.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	HR Admin Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	The Council for Administration (CfA) who are the SSB responsible for developing the unit as recognised by Ofqua
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	CfA - Council for Administration (Unit Submitter and Rules of Combination Developer)
Availability for use	Shared
Unit available from	01/03/2009
Unit guided learning hours	30

Specialised Business Support Services - Parking

Title	Administer parking and traffic challenges, representations and civil parking appeals	
CfA Unit No.	Q333	
WBA Unit No.	L/601/2648	
Level	3	
Credit Value	9	
GLH	40	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the organisational and legal context for administering parking and traffic challenges, representations and appeals	1.1 Describe the services they are responsible for 1.2 Clarify the limits and scope of their responsibilities and authority in providing services 1.3 Explain their organisation's policies, procedures and constraints that affect services in their area of responsibility 1.4 Explain how to apply their organisation's policies, procedures and constraints in their work 1.5 Describe the current legislation, codes of practice and Traffic Regulation Orders that apply when dealing with challenges, representations and CPN appeals 1.6 Explain the requirements of the Data Protection Act and its implications for their role 1.7 Explain how to access and use the sources of information needed to deal with challenges, representations and CPN appeals 1.8 Interpret the documents that are used in parking control administration in relation to dealing with challenges, representations and CPN appeals	
2. Understand how to register receipt of challenges, representations and CPN appeals	2.1 Explain how to communicate effectively with customers in order to be clear about the nature of their enquiry	

	<p>2.2 Clarify the courses of action available to customers</p> <p>2.3 Clarify the information that is needed to consider a challenge, representation or CPN appeal,</p> <p>2.4 Explain why the specified information is required</p> <p>2.5 Explain the criteria for cancellation</p> <p>2.6 Clarify why it is important to record receipt of a challenge, representation or CPN appeal</p> <p>2.7 Explain how to identify evidence that is reliable, valid and sufficient</p> <p>2.8 Describe the information and evidence that has to be provided by the customer</p> <p>2.9 Explain how to check that customer information is valid</p> <p>2.10 Describe the specialist software used by their organisation for the recording and processing of challenges, representations and CPN appeals</p> <p>2.11 Explain how to use the specialist software used by their organisation for the recording and processing of challenges, representations and CPN appeals</p>
<p>3. Understand how to respond to challenges, representations and CPN appeals</p>	<p>3.1 Describe the range of internal evidence that is needed to support a reliable decision</p> <p>3.2 Explain where to obtain the internal information that is needed to support a reliable decision</p> <p>3.3 Explain how to clarify the details of the customer's challenge, representation and CPN appeal through oral or written questioning</p> <p>3.4 Clarify the limits of own responsibility in investigating challenges, representations and CPN appeals</p> <p>3.5 Identify who to refer matters outside of own authority to</p> <p>3.6 Explain how to identify and obtain</p>

	<p>evidence that has not been provided</p> <p>3.7 Explain how to make decisions that are supported by the evidence and comply with current legal and organisational requirements</p> <p>3.8 Identify the courses of action that a customer can take once a decision has been made</p> <p>3.9 Explain the consequences of taking the courses of action that a customer can take once a decision has been made</p>
<p>4. Be able to register receipt of challenges, representations and CPN appeals</p>	<p>4.1 Respond promptly to a customer's initial enquiry with accurate advice</p> <p>4.2 Record receipt of the written challenge, representation or CPN appeal</p> <p>4.3 Make sure they have the information they need to understand the customer's case</p> <p>4.4 Check the details of the documentation received for accuracy, consistency and validity</p> <p>4.5 If the documentation fails to meet the requirements for considering the challenge, representation or CPN appeal promptly inform the customer of this and the courses of action they can take</p> <p>4.6 If the customer's situation does not fall within recognised criteria for cancellation inform the customer of this and the courses of action they can take</p> <p>4.7 At all stages, comply with organisational and legal requirements</p>
<p>5. Be able to respond to challenges, representation and CPN appeals</p>	<p>5.1 Collate evidence for response to the challenge, representation or CPN appeal</p> <p>5.2 If necessary, take prompt action to suspend the enforcement process while the case is being investigated</p> <p>5.3 Make sure all internal records are accurate, reliable, valid and up-to-</p>

	<p>date</p> <p>5.4 Review the documentation to make sure there is sufficient evidence</p> <p>5.5 Decide whether there is a need additional evidence</p> <p>5.6 Where necessary, obtain the additional items of evidence needed</p> <p>5.7 Refer any matter which is beyond the limits of their responsibility to the appropriate person</p> <p>5.8 Review all evidence and make a decision</p> <p>5.9 Inform the customer, in writing and within agreed timescales, of the decision and the courses of action that they can take</p> <p>5.10 Where appropriate, reactivate the enforcement process</p> <p>5.11 Keep copies of all correspondence and update records</p> <p>5.12 At all stages, comply with current organisational and legal requirements</p>
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Additional Information about the unit

Unit purpose and aim(s)	This unit is about the skills, knowledge and understanding learners need to administer parking and traffic challenges, representations and civil parking appeals.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA) NOS
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	CfA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting	CfA

the unit	
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	40

Title	Administer statutory parking and traffic appeals	
CfA Unit No.	Q334	
CfA WBA No.	R/601/2649	
Level	3	
Credit Value	9	
GLH	45	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the organisational and legal context for administering statutory parking and traffic appeals	1.1 Describe the services for which they are responsible 1.2 Explain the organisation's policies, procedures and constraints that affect services in their area of responsibility 1.3 Describe the rules that apply when dealing with statutory appeals (e.g. Codes of Conduct, Code of Practice) 1.4 Interpret Traffic Regulation Orders 1.5 Describe the current legislation that applies when dealing with statutory appeals (e.g. Traffic Management Act 2004) 1.6 Explain the requirements of the Data Protection Act and its implications for their role	
2. Understand how to prepare case evidence	2.1 Describe the specialist software used by their organisation for the recording and processing of statutory appeals 2.2 Explain how to identify evidence that is sufficient, reliable and valid 2.3 Identify the information has to be provided 2.4 Explain how to check that information provided is accurate 2.5 Explain the grounds on which someone may appeal 2.6 Explain the grounds on which someone may file a statement of truth 2.7 Clarify the importance of acting within the given deadline for the	

	<p>case and the consequences of failing to do so</p> <p>2.8 Clarify the limits of their responsibility in investigating statutory appeals</p> <p>2.9 Identify to whom matters outside own authority should be referred</p>
3. Understand how to investigate the case for statutory appeal and decide how to proceed	<p>3.1 Describe what evidence is needed and why</p> <p>3.2 Explain how to identify evidence that has not been provided</p> <p>3.3 Explain how to obtain evidence that has not been provided</p> <p>3.4 Identify who to consult if further information is needed</p>
4. Understand how to contest a statutory appeal	<p>4.1 Explain how to prepare a case summary</p> <p>4.2 Explain how to present a case summary</p> <p>4.3 Clarify why it is important to present a case summary in the specified way</p> <p>4.4 Explain how to prepare the documentation for a case that is not to be contested</p> <p>4.5 Explain the organisation's requirements for the presentation and organisation of documents for a statutory appeal hearing</p> <p>4.6 Explain how to prepare to attend a hearing</p> <p>4.7 Explain the Code of Conduct which regulates how to behave when attending a statutory appeal</p> <p>4.8 Describe the kinds of further information that might be requested</p>
5. Understand how to respond to the outcome of a statutory appeal	<p>5.1 Describe the actions to take to close a case</p> <p>5.2 Explain how to arrange for refunds of fees to be paid</p> <p>5.3 Describe the records (paper and electronic) that need to be updated to record the outcome of the</p>

	<p>statutory appeal and how to do this</p> <p>5.4 Identify who to inform of the outcomes of a statutory appeal</p> <p>5.5 Clarify why it is important to inform specified persons of the outcomes of a statutory appeal</p> <p>5.6 Explain the courses of action that are available to the appellant</p> <p>5.7 Explain the courses of action that are available to the respondent</p> <p>5.8 Describe what actions to take to reactivate the recovery process</p>
<p>6. Be able to prepare case evidence</p>	<p>6.1 Record receipt of the statutory appeal notification or revocation order</p> <p>6.2 Take action to suspend the enforcement process during the investigation</p> <p>6.3 Check the details of the documentation received for accuracy and consistency</p> <p>6.4 Notify the appropriate person of any discrepancies</p> <p>6.5 Understand the grounds on which the customer is appealing or the statement of truth has been filed</p> <p>6.6 At all stages comply with current organisational and legal requirements</p> <p>6.7 At all stages carry out work within the given deadline for the case</p>
<p>7. Be able to investigate a case for statutory appeal and decide how to proceed</p>	<p>7.1 Make sure all necessary evidence is present, accurate, valid and reliable</p> <p>7.2 Identify and obtain any additional items of evidence that are needed</p> <p>7.3 Where necessary consult other people to obtain further information</p> <p>7.4 Refer any matter which is beyond the limits of own responsibility to the appropriate person</p> <p>7.5 Review all evidence</p> <p>7.6 Make and record a decision on the basis of the evidence</p> <p>7.7 Where the decision is not to contest</p>

	<p>the statutory appeal or the statement of truth, make sure that the adjudicator and appellant or respondent are informed and that the decision has been recorded properly</p> <p>7.8 At all stages comply with current organisational and legal requirements</p>
8. Be able to contest a statutory appeal	<p>8.1 Prepare a case summary in accordance with organisational guidelines and relevant codes of practice</p> <p>8.2 Collate, label and present documentation in the format required by the appeals service</p> <p>8.3 Make sure copies of documentation are provided to all relevant people</p> <p>8.4 Make sure that they are prepared to respond to requests for further information including when a statutory appeal is referred by an adjudicator to an independent person to consider mitigation</p> <p>8.5 If they attend the hearing, ensure that they are fully conversant with the case and comply with the Code of Conduct for personal attendance</p>
9. Be able to respond to the outcomes of a statutory appeal	<p>9.1 On receiving notification of the outcome of the statutory appeal, update all records in accordance with organisational and legal requirements</p> <p>9.2 Proceed with the case as appropriate to the outcomes of the statutory appeal</p> <p>9.3 Review and consider the adjudicator's feedback</p> <p>9.4 Take appropriate actions in response to the adjudicator's feedback</p>
Additional Information about the unit	
Unit purpose and aim(s)	This unit is about the skills, knowledge and understanding required to administer statutory parking and traffic appeals.

Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA) NOS
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	CfA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	45

Title	Administer parking and traffic debt recovery	
CfA Unit No.	Q335	
WBA Unit No.	J/601/2650	
Level	3	
Credit Value	9	
GLH	54	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the organisational and legal context for administering parking and traffic recovery	1.1 Describe the services they are responsible for 1.2 Clarify the limits and scope of their responsibilities and authority in providing services 1.3 Explain their organisation's policies, procedures and constraints that affect services in own area of responsibility 1.4 Explain how to apply their organisation's policies, procedures and constraints that affect services in own area of responsibility 1.5 Describe the current legislation and regulations that apply 1.6 Explain the requirements of the Data Protection Act and its implications for own role 1.7 Explain the criteria, policy and procedures in relation to debt recovery (e.g. for non-collection, write off, case closure, tracing and recovery, maximising debt collection, reporting, performance management) 1.6 Explain the debt recovery process within the organisation	
2. Understand the processes involved in debt recovery	2.1 Explain the role of Traffic Enforcement Centre and/or the magistrates court in the debt recovery process 2.2 Describe the debt recovery documentation to be served 2.3 Explain how to serve debt recovery documentation	

	<p>2.4 Describe the case evidence that may be used</p> <p>2.5 Explain how to investigate a case</p> <p>2.6 Clarify the limits of own responsibility</p> <p>2.7 Identify to whom matters outside own authority should be referred</p> <p>2.8 Describe the range of possible outcomes of a case</p> <p>2.9 Identify the appropriate actions to take for each possible outcome of a case</p> <p>2.10 Clarify the role of debt recovery agents and other agencies</p> <p>2.11 Explain how to communicate effectively with debt recovery agents and other outside agencies</p> <p>2.12 Clarify the importance of the audit trail</p> <p>2.13 Explain how to update and maintain records as necessary</p> <p>2.14 Describe the reports that are required</p> <p>2.15 Explain how and when to produce required reports</p> <p>2.16 Explain how to close a case in line with organisational policy and relevant legislation</p>
<p>3. Be able to administer parking and traffic debt recovery</p>	<p>3.1 Monitor the quality of the data to be registered at Traffic Enforcement Centre (TEC) or magistrates court</p> <p>3.2 Ensure debt recovery documentation is served in accordance with organisational policy and relevant legislation</p> <p>3.3 Investigate the case and prepare case evidence in accordance with organisational policy and relevant legislation</p> <p>3.4 Review all evidence; make and record a decision on the basis of the evidence</p> <p>3.5 Where the decision is not to pursue the case make sure that relevant</p>

	<p>people are informed and that the decision has been recorded properly</p> <p>3.6 Where the decision is to pursue the case, proceed in accordance with organisational policy and relevant legislation</p> <p>3.7 Respond appropriately to the outcomes of the case, review feedback and take appropriate action</p> <p>3.8 Liaise with debt recovery agents</p> <p>3.9 Liaise with outside agencies</p> <p>3.10 Monitor the performance of debt recovery agents</p> <p>3.11 Produce relevant reports</p> <p>3.12 Update and maintain records in line with organisational policy and relevant legislation</p> <p>3.13 At all stages carry out work within the given deadlines for the case</p> <p>3.14 Close the case in accordance with organisational policy and relevant legislation</p>
Additional Information about the unit	
Unit purpose and aim(s)	This unit is about the skills, knowledge and understanding required to administer parking and traffic debt recovery.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA) NOS
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	CfA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA

Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	54

Title	Administer parking dispensations	
CfA Unit No.		
WBA Unit No.	J/601/2647	
Level	2	
Credit Value	4	
GLH	14	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the organisational and legal context for administering parking dispensations	1.1 Describe the services that they are responsible for 1.2 Clarify the limits and scope of their responsibilities and authority in providing services 1.3 Explain the organisation's policies, procedures and constraints that affect services in their area of responsibility 1.4 Explain how to apply the organisation's policies, procedures and constraints that affect services in their area of responsibility 1.5 Describe the current legislation, Traffic Regulation Orders and other regulations that apply 1.6 The requirements of the Data Protection Act and its implications for own role 1.7 Describe the specialist software used by the organisation for the issue of permits, season tickets, suspensions, dispensations / waivers and blue badges 1.8 Explain how to use the specialist software used by the organisation for the issue of permits, season tickets, suspensions, dispensations / waivers and blue badges	
2. Understand the processes involved in administering parking dispensations	2.1 Explain the criteria, policy and procedures in relation to permits, season tickets, suspensions, dispensations / waivers and blue	

	<p>badges</p> <p>2.2 Clarify the range of checks that are relevant to applications</p> <p>2.3 Explain how and when to carry out the range of checks that are relevant to applications</p> <p>2.4 Clarify the organisation's anti-fraud policies and procedures</p> <p>2.5 Explain how to operate the organisation's anti-fraud policies and procedures</p> <p>2.6 Describe the evidence required to support an application for a permit, season tickets, suspension, dispensation / waiver or blue badge</p> <p>2.7 Explain the payment and refund processing within the organisation</p> <p>2.8 Explain how to communicate effectively with customers and other relevant departments</p> <p>2.9 Clarify the importance of the audit trail of controlled stationary</p> <p>2.10 Explain how to update and maintain records as necessary</p>
<p>3. Be able to receive and process applications for parking dispensations</p>	<p>3.1 Advise customers on criteria for eligibility</p> <p>3.2 Review applications and supporting evidence against published criteria</p> <p>3.3 Seek additional evidence from the customer if required</p> <p>3.4 Carry out relevant checks in accordance with organisational procedures</p> <p>3.5 Where necessary, seek opinions from appropriate medical professionals</p> <p>3.6 Handle supporting documentation securely and in line with current legislation or relevant terms and conditions</p> <p>3.7 Make a decision to approve or decline the application</p>
<p>4. Be able to issue documentation for</p>	<p>4.1 Communicate the decision to the</p>

parking dispensations	<p>customer, return documentation where necessary and issue appropriate paperwork</p> <p>4.2 Maintain appropriate records including renewals</p> <p>4.3 Process payments and handle refunds in line with organisational procedures</p> <p>4.4 Communicate the decision or information to other relevant departments</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit covers the knowledge and understanding learners need to administer dispensations. It also covers the practical application of this knowledge and understanding.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	The Council for Administration (CfA) who are the SSB responsible for developing the unit as recognised by Ofqual
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	CfA - Council for Administration (Unit Submitter and Rules of Combination Developer)
Availability for use	Shared
Unit available from	01/03/2010
Unit guided learning hours	14

Business Support Services - Education

Title	Provide administrative support in schools
CfA Unit No.	Q332
WBA Unit No.	D/601/7787
Level	3
Credit Value	8
GLH	53
Learning Outcomes	Assessment Criteria
The learner will	The learner can
1. Understand how to develop and maintain contacts in a school environment	1.1 Explain why it is important to build positive working relationships with contacts 1.2 Describe how to build positive working relationships with contacts 1.3 Clarify why it is important for the school to have a friendly and efficient way of dealing with contacts 1.4 Describe the types of contacts they deal with and the requirements that they have 1.5 Explain how to meet the needs of contacts 1.6 Explain why it is important to present a positive image of themselves and their school 1.7 Describe the types of problems that may occur with contacts - including conflict and aggression - 1.8 Explain the procedures for dealing with the types of problems that may occur with contacts - including conflict and aggression 1.9 Describe the types of administrative and organisational support that they may be required to provide to school contacts and the wider community
2. Understand the environment in which the school operates	2.1 Describe the social context in which the school operates, including the cultural diversity of the community

	<p>2.2 Explain how the social context in which the school operates impacts on the school environment</p>
<p>3. Understand how their own role contributes to the work of the school</p>	<p>3.1 Explain how their own role contributes to the school's goals</p> <p>3.2 Explain how their own role contributes to the school's improvement or development priorities</p> <p>3.3 Explain how their own role supports teaching and learning</p> <p>3.4 Clarify the limits of their own authority</p> <p>3.5 Explain why it important to act within the limits of own authority</p> <p>3.6 Clarify when to refer issues to a higher authority</p> <p>3.7 Identify who to refer issues to</p>
<p>4. Understand the policies and procedures they should follow in a school environment</p>	<p>4.1 Describe the policy context, wider issues and initiatives that affect the work of the school, (e.g. relevant authority policies; government standards, legislation and regulations; government initiatives; etc)</p> <p>4.2 Explain the school's policy and administrative procedures for dealing with parents, guardians and carers</p> <p>4.3 Clarify their roles and responsibilities in relation to the school's policy and administrative procedures for dealing with parents, guardians and carers</p> <p>4.4 Explain their school's policy and administrative procedures for dealing with pupils and students</p> <p>4.5 Clarify their roles and responsibilities in relation to their school's policy and administrative procedures for dealing with pupils and students</p> <p>4.6 Explain the school's policy and administrative procedures for</p>

	<p>dealing with the wider community</p> <p>4.7 Clarify their roles and responsibilities in relation to their school's policy and administrative procedures for dealing with the wider community</p>
<p>5. Understand policies and procedures in relation to child protection and student welfare in a school environment</p>	<p>5.1 Explain how to comply with policies and procedures relating to child protection and student welfare</p> <p>5.2 Explain how to report concerns about child protection and student welfare to an appropriate person</p>
<p>6. Understand the school's administrative systems and procedures</p>	<p>6.1 Explain the purpose of school administration systems and procedures</p> <p>6.2 Clarify why the school's administrative systems and procedures are important</p> <p>6.3 Describe the school's administrative and organisational systems and procedures in relation to own role</p> <p>6.4 Explain methods of analysing and evaluating information</p> <p>6.4 Clarify the school's procedures for producing reports</p>
<p>7. Understand how to handle confidential information in a school environment</p>	<p>7.1 Explain to identify confidential information in line with the school's procedures and relevant data protection legislation</p> <p>7.2 Explain why confidential information should be safeguarded</p> <p>7.3 Explain how to safeguard confidential information</p> <p>7.5 Explain the limits of their authority in relation to confidential information</p> <p>7.5 Clarify when to refer confidential information to the relative authority or appropriate person</p> <p>7.6 Explain who to refer confidential information to (e.g. where concerns for a child's safety</p>

	override confidentiality)
8. Be able to develop and maintain contacts in a school environment	8.1 Build positive working relationships 8.2 Present a positive image of themselves and their school 8.3 Communicate effectively with contacts
9. Be able to follow school procedures for relationships with other people	9.1 Follow school policies and procedures for dealing with parents, guardians and carers 9.2 Follow school policies and procedures for dealing with pupils and students 9.3 Follow school policies and procedures for dealing with colleagues and the wider community
10. Be able to implement school administrative systems and procedures	10.1 Provide effective administrative and organisational support to school contacts and the wider community 10.2 Operate school administration systems 10.3 Analyse and evaluate information 10.4 Produce reports in line with school procedures
11. Be able to handle confidential information in a school environment	11.1 Safeguard confidential information 11.2 Act within the limits of their authority 11.3 Refer issues beyond their authority to the appropriate person
Additional Information about the unit	
Unit purpose and aim(s)	This unit is about the application of knowledge and understanding of administrative support services in schools.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA) NOS
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or	CfA

other appropriate body (if required)	
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	53

Specialised Business support Services - Legal

Title	Administer legal files	
CfA Unit No.	Q355	
WBA Unit No.	H/601/7791	
Level	3	
Credit Value	7	
GLH	25	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand legislative and organisational procedures for administering legal files	1.1 Describe the administrative services that they are responsible for 1.2 Explain the limits and scope of their responsibilities and authority in providing administrative services 1.3 Explain the organisation's policies, procedures and constraints that affect administrative services in their area of responsibility 1.4 Describe the duty of confidentiality that applies when they are dealing with client information 1.5 Describe the specialist software used by the organisation for the recording and processing of legal cases 1.6 Explain the importance of accuracy and attention to detail when dealing with information in a legal context 1.7 Explain where and when to refer matters that are beyond their authority 1.8 Explain how to prioritise work and work to other peoples' priorities	
2. Understand the type of legal work they are responsible for	2.1 Describe the type of legal work that their department is involved in (for example, conveyancing, family law, commercial, litigation) 2.2 Interpret the particular legal terminology that is associated with different types of legal work	
3. Understand how to open legal files	3.1 Explain the organisation's procedures for opening files	

	<p>3.2 Describe the different checks and searches that are needed</p> <p>3.3 Explain how to carry out the different checks and searches</p> <p>3.4 Explain the contents and purpose of a client care letter</p> <p>3.5 Explain how to prepare a client care letter</p>
4. Understand how to maintain and administer a legal file	<p>4.1 Describe the organisation's house-style for the presentation of files and documents</p> <p>4.2 Describe the types of documents that are required</p> <p>4.3 Explain how to prepare the different types of documents that are required</p> <p>4.4 Explain how to carry out research required by the fee earner</p> <p>4.5 Explain how to report progress to clients</p> <p>4.6 Explain how to record costs and disbursements</p> <p>4.7 Explain how time spent on a matter is monitored and recorded in their organisation</p> <p>4.8 Describe the range of activity and documentation that needs to be noted within a file</p> <p>4.9 Explain how and when to generate bills from the information in a file</p>
5. Understand how to close and archive a legal file	<p>5.1 Explain the types of documents, knowledge or data that might need to be added to the organisation's precedent, knowledge or data bank</p> <p>5.2 Describe the organisation's procedures for closing and archiving files</p> <p>5.3 Explain how to sort a file and identify materials that do not need to be kept</p>
6. Be able to open a legal file	<p>6.1 Carry out checks and searches as appropriate and report on outcomes to the fee earner</p> <p>6.2 Receive money on account from</p>

	<p>clients as instructed and process in line with organisational requirements</p> <p>6.3 Open a file and enter matter information</p> <p>6.4 Generate client care letters</p>
7. Be able to maintain and administer a legal file	<p>7.1 Produce and amend correspondence and documents as instructed</p> <p>7.2 Make sure all relevant timescales and dates are entered in appropriate diaries</p> <p>7.3. Carry out research as instructed and report back to fee earner</p> <p>7.4 Report progress to clients as instructed by fee earner</p> <p>7.5 Make sure all costs and disbursements are recorded accurately</p> <p>7.6 Make sure all file management activities conform to house-style and organisational requirements</p> <p>7.7 Make sure all time spent on the matter is recorded accurately</p> <p>7.8 Generate bills as requested, in accordance with instructions</p>
8. Be able to close and archive a legal file	<p>8.1 Review the file and identify any outstanding issues and unbilled disbursements</p> <p>8.2 Report outstanding issues to the fee earner for resolution</p> <p>8.3 Where necessary, deal with reimbursements</p> <p>8.4 Check with the fee earner whether any documents, knowledge or data needs to be added to the firm's precedent, knowledge or data bank</p> <p>8.5 Make sure the file is complete for preparation of the final bill</p> <p>8.6 If appropriate, prepare the final bill</p> <p>8.7 Complete file closing documentation</p> <p>8.8 Check that the account shows a nil balance</p> <p>8.9 Notify relevant people that the file</p>

	<p>is closing</p> <p>8.10 Sort the file, removing unnecessary material</p> <p>8.11 Check with the fee earner on the appropriate distribution of documents</p> <p>8.12 Make sure that hard copies of electronic communications are in the file</p> <p>8.13 Prepare a schedule of the file contents so that they can be readily retrieved</p> <p>8.14 Correctly label files for storage</p> <p>8.15 Amend records to show that the file is closed</p> <p>8.16 Make arrangements for the file to be archived</p>
Additional Information about the unit	
Unit purpose and aim(s)	This unit is about the skills and underpinning knowledge to open, maintain and administer legal files; review and close files; prepare final bills and store; and, arrange for files to be archived.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	BAB111: Administer legal files
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration (CfA)
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010

Title	Build case files	
CfA Unit No.	Q356	
WBA Unit No.	K/601/7792	
Level	3	
Credit Value	4	
GLH	20	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the organisational and legal context for building case files	1.1 Describe the services that they are responsible for 1.2 Describe the limits and scope of their responsibilities and authority in providing these services 1.3 Explain their organisation's policies, procedures and constraints that affect services in their area of responsibility 1.4 Explain how to apply their organisation's policies and procedures 1.5 Describe the legislation, regulations and codes of practice that apply in the sector to their area of responsibility 1.6 Describe the working culture and practices in the sector 1.7 Explain their organisation's procedures for building cases 1.8 Describe when and to whom to refer matters that are beyond their authority	
2. Understand how to handle information when building cases	2.1 Explain the legal and organisational requirements covering the security and confidentiality of information 2.2 Clarify the purpose of accuracy and attention to detail when dealing with information in a legal context 2.3 Explain how to access and use the sources of information that are required 2.4 Describe their organisation's house style and requirements for presentation of case files and	

	documentation
3. Understand how to build a case file	<p>3.1 Explain how to identify evidence and materials that have not been provided</p> <p>3.2 Explain the types of evidence and materials that may be required</p> <p>3.3 Explain how and where to obtain evidence and materials that have not been provided</p> <p>3.4 Explain how to conduct interviews and gather evidence</p> <p>3.5 Explain how to adapt communication to the needs of a witness or client</p> <p>3.6 Describe the types of documentation and correspondence that might be required and how to produce them</p> <p>3.7 Identify who to consult if further information is needed</p> <p>3.8 Identify the timescales and deadlines that apply to the case</p> <p>3.9 Explain the consequences of failing to meet given timescales and deadlines</p> <p>3.10 Explain the types of follow-up action that may be required</p>
4. Be able to build a case file	<p>4.1 Receive and open a case file</p> <p>4.2 Review the case file and identify additional evidence and materials required</p> <p>4.3 Obtain all additional items of evidence and materials</p> <p>4.4 Produce documents and correspondence</p> <p>4.5 Consult other people where necessary</p> <p>4.6 Make sure information is kept secure and confidential</p> <p>4.7 Review the materials to make sure all the relevant information is present in order to proceed</p> <p>4.8 Submit the case file on time</p>
Additional Information about the unit	

Unit purpose and aim(s)	This unit is about the skills and underpinning knowledge to receive and open case files; review and build case files; submit case files; and, follow up any actions.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	BAB112: Build case files
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Guidance
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration (CfA)
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010

Title	Manage case files	
CfA Unit No.	Q357	
WBA Unit No.	M/601/7793	
Level	3	
Credit Value	5	
GLH	25	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the legislative and organisational requirements for managing case files	1.1 Explain the administrative services that they are responsible for 1.2 Explain the limits and scope of their responsibilities and authority in providing administrative services 1.3 Explain their organisation's policies, procedures in relation to administrative services 1.4 Explain the constraints that affect administrative services in their area of responsibility 1.5 Explain how to apply their organisation's policies and procedures 1.6 Describe the legislation, regulations and codes of practice that apply in the sector to their area of responsibility 1.7 Explain the working culture and practices in the sector 1.8 Describe their organisation's house style and requirements for presentation of correspondence and documents 1.9 Explain their organisation's procedures for closing and archiving case files 1.10 Explain where and when to refer matters that are beyond their authority	
2. Understand how to handle case information	2.1 Explain the legal and organisational requirements covering the security and confidentiality of information 2.2 Explain the importance of accuracy and attention to detail when	

	<p>dealing with information in a legal context</p> <p>2.3 Explain how to carry out research and identify sources of information</p>
3. Understand how to manage case files	<p>3.1 Explain the procedures for receiving and opening a case file</p> <p>3.2 Describe the structure, format and content of a case file</p> <p>3.3 Explain methods of liaising and communicating with relevant people</p> <p>3.4 Describe how to keep a case file up to date</p> <p>3.5 Describe the documents that are required for court bundles</p> <p>3.6 Explain how to ensure that documentation is complete at each stage of the process</p> <p>3.7 Identify who to consult if further information is needed</p> <p>3.8 Explain the timescales and deadlines that apply to the case</p> <p>3.9 Describe the consequences of failing to meet timescales and deadlines</p> <p>3.10 Explain how to action and record hearing outcomes</p> <p>3.11 Explain the appeal documentation required in relation to own area of work</p> <p>3.12 Explain how to process appeal documentation in relation to own area of work</p> <p>3.13 Describe how to record the outcome of an appeal</p>
4. Be able to manage case files	<p>4.1 Receive and open a case file</p> <p>4.2 Review the file and plan its management to meet required deadlines</p> <p>4.3 Obtain or identify the location of all file documents and materials</p> <p>4.4 Produce and amend documents as requested</p> <p>4.5 Liaise with the relevant people to</p>

	<p>progress the case</p> <p>4.6 Keep the case file up to date, checking documentation is complete</p> <p>4.7 Make sure information is kept secure and confidential</p> <p>4.8 Prepare court bundles as requested, checking documentation is complete</p> <p>4.9 Consult other people where necessary</p> <p>4.10 Submit documents on time</p> <p>4.11 Action and record hearing outcomes as necessary</p> <p>4.12 Where necessary, process appeal documentation as requested</p> <p>4.13 Liaise as appropriate with the relevant people to progress the appeal</p> <p>4.14 Record the outcome of the appeal where relevant</p> <p>4.15 Prepare the case file for closure</p> <p>4.16 Notify relevant people that the case file is closing</p> <p>4.17 Close the case file</p> <p>4.18 Arrange for the case file to be archived</p>
Additional Information about the unit	
Unit purpose and aim(s)	This unit is about the skills and underpinning knowledge to receive, open, review, update, prepare for closure and close case files; prepare court bundles; process appeal documentation; and, follow up appeals actions.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	BAB113: Manage case files
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Guidance

Support for the unit from an SSC or other appropriate body (if required)	Council for Administration (CfA)
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010

Health, Safety and Security of people Premise and property

Title	Use occupational health and safety guidelines when using keyboards	
CfA Unit No.	Q113	
WBA Unit No.	T/601/2465	
Level	1	
Credit Value	2	
GLH	20	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the purpose of occupational health and safety procedures when using keyboards and workstation care and maintenance	1.1 State occupational health and safety guidelines in relation to using keyboards 1.2 Explain the purpose of following occupational health and safety guidelines for using keyboards 1.3 Describe how to position fingers, wrists, forearms and back in relation to the equipment being used 1.4 Describe procedures for workstation care and maintenance	
2. Be able to use occupational health and safety guidelines	2.1 Demonstrate correct positioning of fingers, wrists, forearms and back in relation to the equipment being used 2.2 Follow procedures for workstation care and maintenance 2.3 Follow occupational health and safety guidelines for using keyboards 2.4 Use techniques to prevent repetitive strain syndrome in accordance with occupational health and safety guidelines	
Additional Information about the unit		
Unit purpose and aim(s)	This unit is about following occupational health and safety guidelines when using keyboards and workstation care and maintenance.	

Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Council for Administration (CfA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Council for Administration
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	CfA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	20

IT

Title	Bespoke software	
CfA Unit No.		
WBA Unit No.	F/502/4396	
Level	2	
Credit Value	3	
GLH	20	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Input and combine information using bespoke applications	1.1 Input relevant information accurately so that it is ready for processing 1.2 Select and use appropriate techniques to link and combine information of different forms or from different sources within the software 1.3 Respond appropriately to data entry error messages	
2. Use appropriate structures to organise and retrieve information efficiently	2.1 Describe what functions to apply to structure and layout information effectively 2.2 Select and use appropriate structures and/or layouts to organise information 2.3 Apply local and/or legal guidelines and conventions for the storage and use of data where available	
3. Use the functions of the software effectively to process and present information	3.1 Select and use appropriate tools and techniques to edit, process and format information 3.2 Check information meets needs, using IT tools and making corrections as necessary 3.3 Select and use appropriate methods to present information	

Additional Information about the unit	
Unit purpose and aim(s)	<p>This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively.</p> <p>This unit is about the skills and knowledge</p>

	<p>needed by an IT User to select and use a wide range of intermediate bespoke software tools and techniques for information that is at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.</p> <p>Bespoke software tools and techniques will be defined as 'intermediate' because:</p> <ul style="list-style-type: none"> > the software tools and functions involved will at times be non-routine or unfamiliar; > the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements and at times be multi-step; > the user will take some responsibility for inputting, manipulating and outputting the information.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	20

Title	Data management software	
CfA Unit No.		
WBA Unit No.	J/502/4559	
Level	2	
Credit Value	3	
GLH	20	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Enter, edit and maintain data records in a data management system	1.1 Describe the risks to data security and procedures used for data protection 1.2 Enter data accurately into groups of records to meet requirements 1.3 Locate and amend data associated with groups of records 1.4 Check data records meet needs, using IT tools and making corrections as necessary 1.5 Respond appropriately to data entry and other error messages 1.6 Apply local and/or legal guidelines for the storage and use of data where available	
2. Retrieve and display data records to meet requirements	2.1 Identify what queries and reports need to be run to output the required information 2.2 Select and use queries to search for and retrieve information to meet given requirements 2.3 Create and view reports to output information from the system to meet given requirements	

Additional Information about the unit	
Unit purpose and aim(s)	This is the ability to use a software application designed to store and retrieve data needed for a variety of business functions. It also includes an understanding of the features and facilities of the software and the purpose for which the data is stored. Data management software is often implemented on relational database systems by providing predefined file and record structures, processes, reports and data-entry screens. This is about the use of these predefined objects. This unit is about the skills and knowledge required by an IT user to select and use

	<p>intermediate data management software tools and techniques to:</p> <ul style="list-style-type: none"> > enter information into data management systems that is at times non-routine or unfamiliar; > retrieve information using multiple selection criteria; and > produce customised reports from the system. <p>The data management system tools, functions and techniques will be described as 'intermediate' because:</p> <ul style="list-style-type: none"> > the software tools and functions involved will at times be non-routine or unfamiliar; and > the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements. Any aspect that is unfamiliar may require support and advice from others.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	20

Title	Database software	
CfA Unit No.		
WBA Unit No.	M/502/4555	
Level	2	
Credit Value	4	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Create and modify non-relational database tables	1.1 Identify the components of a database design 1.2 Describe the field characteristics for the data required 1.3 Create and modify database tables using a range of field types 1.4 Describe ways to maintain data integrity 1.5 Respond appropriately to problems with database tables 1.6 Use database tools and techniques to ensure data integrity is maintained	
2. Enter, edit and organise structured information in a database	2.1 Create forms to enter, edit and organise data in a database 2.2 Select and use appropriate tools and techniques to format data entry forms 2.3 Check data entry meets needs, using IT tools and making corrections as necessary 2.4 Respond appropriately to data entry errors	
3. Use database software tools to run queries and produce reports	3.1 Create and run database queries using multiple criteria to display or amend selected data 3.2 Plan and produce database reports from a single table non-relational database 3.3 Select and use appropriate tools and techniques to format database reports 3.4 Check reports meet needs, using IT tools and making corrections as necessary	
Additional Information about the unit		
Unit purpose and aim(s)	This is the ability to use a software application designed to organise and store structured information and generate	

	<p>reports.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use intermediate database software tools and techniques to:</p> <ul style="list-style-type: none"> > enter information into databases, that is at times non-routine or unfamiliar; > retrieve information by creating queries using multiple selection criteria; and > produce reports by setting up menus or short cuts. <p>They will also be able to create and modify single table, non-relational databases. Any aspects that are unfamiliar may require support and advice from others.</p> <p>Database tools, functions and techniques will be described as 'intermediate' because:</p> <ul style="list-style-type: none"> > the software tools and functions involved will at times be non-routine or unfamiliar; and > the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	30

Title	Improving productivity using IT	
CfA Unit No.		
WBA Unit No.	J/502/4156	
Level	2	
Credit Value	4	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1 Plan, select and use appropriate IT systems and software for different purposes	1.1 Describe the purpose for using IT 1.2 Describe the methods, skills and resources required to complete the task successfully 1.3 Plan how to carry out tasks using IT to achieve the required purpose and outcome 1.4 Describe any factors that may affect the task 1.5 Select and use IT systems and software applications to complete planned tasks and produce effective outcomes 1.6 Describe how the purpose and outcomes have been met by the chosen IT systems and software applications 1.7 Describe any legal or local guidelines or constraints that may apply to the task or activity	
2 Review and adapt the ongoing use of IT tools and systems to make sure that activities are successful	2.1 Review ongoing use of IT tools and techniques and change the approach as needed 2.2 Describe whether the IT tools selected were appropriate for the task and purpose 2.3 Assess strengths and weaknesses of final work 2.4 Describe ways to make further improvements to work 2.5 Review outcomes to make sure they match requirements and are fit for purpose	
3 Develop and test solutions to improve the ongoing use of IT tools and systems	3.1 Review the benefits and drawbacks of IT tools and systems used, in terms of productivity and efficiency	

	<p>3.2 Describe ways to improve productivity and efficiency</p> <p>3.3 Develop solutions to improve own productivity in using IT</p> <p>3.4 Test solutions to ensure that they work as intended</p>
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Additional Information about the unit	
Unit purpose and aim(s)	<p>The use of IT tools and systems can improve the productivity and efficiency of work activities in a variety of contexts. This unit is about the skills and knowledge needed by the IT User to plan and review their use of predefined or commonly used IT tools for activities that are at times non-routine or unfamiliar. As a result of reviewing their work, they will be able to identify and use automated methods or alternative ways of working to improve productivity.</p> <p>An activity will typically be 'non-routine or unfamiliar' because:</p> <ul style="list-style-type: none"> > the task or context is likely to require some preparation, clarification or research (to separate the components and to identify what factors need to be considered, for example, time available, audience needs, accessibility of source, types of content, message and meaning) before an approach can be planned; and > the techniques required will involve a number of steps and at times be non-routine or unfamiliar.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	30

Title	IT security for users	
CfA Unit No.		
WBA Unit No.	Y/502/4257	
Level	2	
Credit Value	2	
GLH	15	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Select and use appropriate methods to minimise security risk to IT systems and data	1.1 Describe the security issues that may threaten system performance 1.2 Apply a range of security precautions to protect IT systems and data 1.3 Describe the threats to system and information security and integrity 1.4 Keep information secure and manage personal access to information sources securely 1.5 Describe ways to protect hardware, software and data and minimise security risk 1.6 Apply guidelines and procedures for the secure use of IT 1.7 Describe why it is important to backup data and how to do so securely 1.8 Select and use effective backup procedures for systems and data	

Additional Information about the unit	
Unit purpose and aim(s)	This is the ability to protect hardware, software and the data within an IT system against theft, malfunction and unauthorised access. This unit is about the skills and knowledge needed by the IT User to avoid common security risks and control access to software and data; and use a wider range of methods to protect software and data (eg from exchanging information by e-mail or when downloading software from the Internet).
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	

Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	15

Title	Presentation software	
CfA Unit No.		
WBA Unit No.	M/502/4622	
Level	2	
Credit Value	4	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Input and combine text and other information within presentation slides	1.1 Identify what types of information are required for the presentation 1.2 Enter text and other information using layouts appropriate to type of information 1.3 Insert charts and tables into presentation slides 1.4 Insert images, video or sound to enhance the presentation 1.5 Identify any constraints which may affect the presentation 1.6 Organise and combine information of different forms or from different sources for presentations 1.7 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available	
2. Use presentation software tools to structure, edit and format slide sequences	2.1 Identify what slide structure and themes to use 2.2 Select, change and use appropriate templates for slides 2.3 Select and use appropriate techniques to edit slides and presentations to meet needs 2.4 Select and use appropriate techniques to format slides and presentations 2.5 Identify what presentation effects to use to enhance the presentation 2.6 Select and use animation and transition effects appropriately to enhance slide sequences	
3. Prepare slideshow for presentation	3.1 Describe how to present slides to meet needs and communicate effectively 3.2 Prepare slideshow for presentation	

	<p>3.3 Check presentation meets needs, using IT tools and making corrections as necessary</p> <p>3.4 Identify and respond to any quality problems with presentations to ensure that presentations meet needs</p>
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Additional Information about the unit	
Unit purpose and aim(s)	<p>This is the ability to use software applications to produce effective presentations, which include a combination of media (eg images, animation and sound) for education, entertainment or information sharing.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use a wide range of intermediate presentation software tools and techniques effectively to produce presentations that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.</p> <p>Presentation tools and techniques at this level will be described as 'intermediate' because:</p> <ul style="list-style-type: none"> > the software tools and functions used will be at times non-routine or unfamiliar; > the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements; and > the user will take some responsibility for inputting, structuring, editing and presenting the information, which at times may be non-routine or unfamiliar.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	30

Title	Set up an IT system	
CfA Unit No.		
WBA Unit No.	L/502/4210	
Level	2	
Credit Value	4	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Select and connect up a personal computer safely with associated hardware and storage media to meet needs	1.1 Describe what IT system components, storage and peripheral devices are needed 1.2 Describe any health and safety issues associated with setting up an IT system 1.3 Describe the characteristics of IT systems that affect performance 1.4 Select and connect up the components of an IT system safely, including any peripheral devices and storage media	
2. Select and connect an IT system to a communication service to meet needs	2.1 Select and connect communication hardware safely to an IT system 2.2 Describe the factors that affect data transfer 2.3 Select and connect to a communication service from an IT system 2.4 Identify the login and password details needed to connect to an Internet Service Provider (ISP)	
3. Install and configure software for use	3.1 Configure the user interface to meet needs 3.2 Describe what security precautions need to be addressed 3.3 Set up and configure virus protection software 3.4 Install and set up application software to meet needs 3.5 Backup and restore system and data files	
4. Check that the IT system and communication service are working successfully	4.1 Identify what tests can be used to check the IT system and communications 4.2 Select and run suitable tests to make sure that the system and communication service are working	

	<p>successfully</p> <p>4.3 Identify the help and troubleshooting facilities available to solve problems</p> <p>4.4 Respond to faults and error messages and use help and troubleshooting facilities to determine and take appropriate action</p>
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Additional Information about the unit	
Unit purpose and aim(s)	<p>This is the ability to safely set up the components of an IT system (eg personal computer - PC, keyboard, mouse and printer), removable storage media (eg data stick or external DVD drive), communication service to access the Internet and associated software and check that they are working properly.</p> <p>This unit is about the skills and knowledge to connect up an IT system with a range of hardware, removable storage media and a communication service safely and run more advanced tests to check it is working successfully</p>
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	30

Title	Spreadsheet software	
CfA Unit No.		
WBA Unit No.	F/502/4625	
Level	2	
Credit Value	4	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Use a spreadsheet to enter, edit and organise numerical and other data	1.1 Identify what numerical and other information is needed in the spreadsheet and how it should be structured 1.2 Enter and edit numerical and other data accurately 1.3 Combine and link data across worksheets 1.4 Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available	
2. Select and use appropriate formulas and data analysis tools to meet requirements	2.1 Identify which tools and techniques to use to analyse and manipulate data to meet requirements 2.2 Select and use a range of appropriate functions and formulas to meet calculation requirements 2.3 Use a range of tools and techniques to analyse and manipulate data to meet requirements	
3. Select and use tools and techniques to present and format spreadsheet information	3.1 Plan how to present and format spreadsheet information effectively to meet needs 3.2 Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets 3.3 Select and format an appropriate chart or graph type to display selected information 3.4 Select and use appropriate page layout to present and print spreadsheet information 3.5 Check information meets needs, using spreadsheet tools and making corrections as necessary	

	<p>3.6 Describe how to find errors in spreadsheet formulas</p> <p>3.7 Respond appropriately to any problems with spreadsheets</p>
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Additional Information about the unit	
Unit purpose and aim(s)	<p>This is the ability to use a software application designed to record data in rows and columns, perform calculations with numerical data and present information using charts and graphs.</p> <p>This level is about the skills and knowledge required by an IT user to select and use a wide range of intermediate spreadsheet software tools and techniques to produce, present, and check spreadsheets that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.</p> <p>Spreadsheet software tools and techniques will be described as 'Intermediate' because:</p> <ul style="list-style-type: none"> > the range of data entry, manipulation and outputting techniques will be at times non-routine or unfamiliar; > the tools, formulas and functions needed to analyse and interpret the data requires knowledge and understanding (for example, mathematical, logical, statistical or financial); and > the user will take some responsibility for setting up or developing the structure and functionality of the spreadsheet.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	30

Title	Using collaborative technologies	
CfA Unit No.		
WBA Unit No.	F/502/4379	
Level	2	
Credit Value	4	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Stay safe and secure when working with collaborative technology	1.1 Take appropriate steps to avoid risks when working with collaborative technology, in line with relevant guidelines 1.2 Explain what risks there may be in using collaborative technology and how to keep them to a minimum 1.3 Use appropriate methods to promote trust when working collaboratively 1.4 Carry out appropriate checks on others' online identities and different types of information 1.5 Identify and respond to inappropriate content and behaviour	
2. Plan and set up IT tools and devices for collaborative working	2.1 Describe the purposes for using collaborative technologies 2.2 Describe what outcomes are needed from collaborative working and whether or not archiving is required 2.3 Describe the roles, IT tools and facilities needed for collaborative tasks and communication media 2.4 Describe the features, benefits and limitations of different collaborative technology tools and devices 2.5 Describe the compatibility issues in different combinations of collaborative tools and devices 2.6 Select an appropriate combination of IT tools and devices to carry out collaborative tasks 2.7 Connect and configure the combination of IT tools and devices needed for a collaborative task	

<p>3. Prepare collaborative technologies for use</p>	<p>3.1 Describe what access rights and issues others may have in using collaborative technologies</p> <p>3.2 Assess what permissions are needed for different users and content</p> <p>3.3 Set up and use access rights to enable others to access information</p> <p>3.4 Set up and use permissions to filter information</p> <p>3.5 Adjust settings so that others can access IT tools and devices for collaborative working</p> <p>3.6 Select and use different elements to control environments for collaborative technologies</p> <p>3.7 Select and join networks and data feeds to manage data to suit collaborative tasks</p>
<p>4. Contribute to tasks using collaborative technologies</p>	<p>4.1 Describe rules of engagement for using collaborative technologies</p> <p>4.2 Enable others to contribute responsibly to collaborative tasks</p> <p>4.3 Present relevant and valuable information</p> <p>4.4 Moderate the use of collaborative technologies</p> <p>4.5 Archive the outcome of collaborative working</p> <p>4.6 Assess when there is a problem with collaborative technologies and when to get expert help</p> <p>4.7 Respond to problems with collaborative technologies</p>

Additional Information about the unit

<p>Unit purpose and aim(s)</p>	<p>This is the ability to use IT tools and devices for collaborative working and communications, such as web or video conferencing, instant messaging/chat, online phone and video calls; online forums, social networking sites, wikis and other centralised depositories for documents, blogging, RSS and data feeds, bulk SMS or online work management tools. This unit is about the skills and knowledge to facilitate the use of appropriate combinations of IT tools and devices for groups to work collaboratively by:</p>
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	<ul style="list-style-type: none"> > planning and selecting the IT tools and devices to be used for work purposes and tasks; > preparing and setting up access to collaborative technologies; > presenting information and facilitating others contributions; and > moderating the use of collaborative technologies.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	30

Title	Website software	
CfA Unit No.		
WBA Unit No.	R/502/4631	
Level	2	
Credit Value	4	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Create structures and styles for websites	1.1 Describe what website content and layout will be needed for each page 1.2 Plan and create web page templates to layout 1.3 Select and use website features and structures to help the user navigate round web pages within the site 1.4 Create, select and use styles to keep the appearance of web pages consistent and make them easy to understand 1.5 Describe how copyright and other constraints may affect the website 1.6 Describe what access issues may need to be taken into account 1.7 Describe what file types to use for saving content 1.8 Store and retrieve files effectively, in line with local guidelines and conventions where available	
2. Use website software tools to prepare content for websites	2.1 Prepare content for web pages so that it is ready for editing and formatting 2.2 Organise and combine information needed for web pages including across different software 2.3 Select and use appropriate editing and formatting techniques to aid both clarity and navigation 2.4 Select and use appropriate development techniques to link information across pages 2.5 Change the file formats appropriately for content	

	2.6 Check web pages meet needs, using IT tools and making corrections as necessary
3. Publish websites	<p>3.1 Select and use appropriate testing methods to check that all elements of websites are working as planned</p> <p>3.2 Identify any quality problems with websites and how to respond to them</p> <p>3.3 Select and use an appropriate programme to upload and publish the website</p> <p>3.4 Respond appropriately to problems with multiple page websites</p>

Additional Information about the unit	
Unit purpose and aim(s)	<p>This is the ability to use a software application designed for planning, designing and building websites.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use a wide range of intermediate website software tools and techniques to produce multiple-page websites. Any aspect that is unfamiliar may require support and advice from others.</p> <p>Website software tools and techniques will be described as 'intermediate' because:</p> <ul style="list-style-type: none"> > the software tools and functions involved will at times be non-routine or unfamiliar; > the choice and use of development techniques will need to take account of a number of factors or elements; and > the user will take some responsibility for planning the website, creating or altering the template, inputting, manipulating, linking and uploading the content.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	30

Title	Word processing software	
CfA Unit No.		
WBA Unit No.	R/502/4628	
Level	2	
Credit Value	4	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Enter and combine text and other information accurately within word processing documents	1.1 Identify what types of information are needed in documents 1.2 Use appropriate techniques to enter text and other information accurately and efficiently 1.3 Select and use appropriate templates for different purposes 1.4 Identify when and how to combine and merge information from other software or other documents 1.5 Select and use a range of editing tools to amend document content 1.6 Combine or merge information within a document from a range of sources 1.7 Store and retrieve document and template files effectively, in line with local guidelines and conventions where available	
2. Create and modify layout and structures for word processing documents	2.1 Identify the document requirements for structure and style 2.2 Identify what templates and styles are available and when to use them 2.3 Create and modify columns, tables and forms to organise information 2.4 Select and apply styles to text	
3. Use word processing software tools to format and present documents effectively to meet requirements	3.1 Identify how the document should be formatted to aid meaning 3.2 Select and use appropriate techniques to format characters and paragraphs 3.3 Select and use appropriate page and section layouts to present and print documents 3.4 Describe any quality problems with documents	

	<p>3.5 Check documents meet needs, using IT tools and making corrections as necessary</p> <p>3.6 Respond appropriately to quality problems with documents so that outcomes meet needs</p>
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Additional Information about the unit	
Unit purpose and aim(s)	<p>This is the ability to use a software application designed for the creation, editing and production of largely text-based documents.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use a range of intermediate word processing software tools and techniques to produce documents that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.</p> <p>Word processing tools and techniques will be described as 'intermediate' because:</p> <ul style="list-style-type: none"> > the software tools and functions will be at times non-routine or unfamiliar; > the choice of techniques will need to take account of a number of factors or elements; and > the user will take some responsibility for the inputting, manipulating and outputting of the information.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	30

Title	Bespoke software
CfA Unit No.	
WBA Unit No.	J/502/4397
Level	3
Credit Value	4
GLH	30

Learning Outcomes	Assessment Criteria
The learner will	The learner can
1. Input and combine information using bespoke software	1.1 Input relevant information accurately so that it is ready for processing 1.2 Select and use appropriate techniques to link and combine information within the application and across different software applications
2. Create and modify appropriate structures to organise and retrieve information efficiently	2.1 Evaluate the use of software functions to structure, layout and style information 2.2 Create, change and use appropriate structures and/or layouts to organise information efficiently 2.3 Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available
3. Exploit the functions of the software effectively to process and present information	3.1 Select and use appropriate tools and techniques to edit, analyse and format information 3.2 Check information meets needs, using IT tools and making corrections as necessary 3.3 Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs 3.4 Select and use presentation methods to aid clarity and meaning

Additional Information about the unit	
Unit purpose and aim(s)	This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the

	<p>skills and techniques needed to use the software application appropriately and effectively.</p> <p>This unit is about the skills and knowledge needed by an IT user to select and use a range of advanced bespoke software tools and techniques for complex or non-routine information.</p> <p>Bespoke software tools and techniques at this level are defined as 'advanced' because:</p> <ul style="list-style-type: none"> > the software tools and functions used will be complex, and at times involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying; > the inputting, manipulating and outputting techniques will be complex, and will involve research, identification and application; and > the user will take full responsibility for inputting, manipulating and outputting the information.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	30

Title	Data management software	
CfA Unit No.		
WBA Unit No.	A/502/4560	
Level	3	
Credit Value	4	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Enter, edit and maintain data records in a data management system	1.1 Discuss when and how to change or create a new data entry form 1.2 Enter data accurately into records to meet requirements 1.3 Configure characteristics of groups of records 1.4 Discuss and explain how to locate and amend data records 1.5 Check data records meet needs, using IT tools and making corrections as necessary 1.6 Interpret and respond appropriately to a range of data and application error messages 1.7 Evaluate and explain the risks to data security and procedures used for data protection 1.8 Manage data files effectively, in line with local and/or legal guidelines for the storage and use of data where available	
2. Retrieve and display data records to meet requirements	2.1 Determine and explain what queries and reports need to be run to output the required information 2.2 Create and use queries to search for and retrieve information from the system 2.3 Create, define and set up reports to output information to meet requirements 2.4 Use the file handling techniques of the software to import and export data 2.5 Use available techniques to combine and link data	

Additional Information about the unit	
Unit purpose and aim(s)	<p>Unit summary</p> <p>This is the ability to use a software application designed to store and retrieve data needed for a variety of business functions. It also includes an understanding of the features and facilities of the software and the purpose for which the data is stored. Data management software is often implemented on relational database systems by providing predefined file and record structures, processes, reports and data-entry screens. This is about the use of these predefined objects.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use advanced data management software tools and techniques efficiently to:</p> <ul style="list-style-type: none"> > enter complex information; > retrieve information using complex selection criteria; > produce customised reports from the system; and > set up menus or short cuts. <p>The data management system tools, functions and techniques will be described as 'advanced' because:</p> <ul style="list-style-type: none"> > the software tools and functions involved will be complex and at times involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying; and > the input, manipulation and output techniques involved will be complex, which will involve research, identification and application.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills

Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	30

Title	Database software	
CfA Unit No.		
WBA Unit No.	T/502/4556	
Level	3	
Credit Value	6	
GLH	45	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Plan, create and modify relational database tables to meet requirements	1.1 Explain how a relational database design enables data to be organised and queried 1.2 Plan and create multiple tables for data entry with appropriate fields and properties 1.3 Set up and modify relationships between database tables 1.4 Explain why and how to maintain data integrity 1.5 Respond appropriately to problems with database tables 1.6 Use database tools and techniques to ensure data integrity is maintained	
2. Enter, edit and organise structured information in a database	2.1 Design and create forms to access, enter, edit and organise data in a database 2.2 Select and use appropriate tools and techniques to format data entry forms 2.3 Check data entry meets needs, using IT tools and making corrections as necessary 2.4 Respond appropriately to data entry errors	
3. Use database software tools to create, edit and run data queries and produce reports	3.1 Explain how to select, generate and output information from queries according to requirements 3.2 Create and run database queries to display, amend or calculate selected data 3.3 Plan and produce database reports from a multiple-table relational database 3.4 Select and use appropriate tools and techniques to format database reports	

	3.5 Check reports meet needs, using IT tools and making corrections as necessary
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Additional Information about the unit	
Unit purpose and aim(s)	<p>This is the ability to use a software application designed to organise and store structured information and generate reports.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use advanced database software tools and techniques efficiently to:</p> <ul style="list-style-type: none"> > enter complex information into databases; > retrieve information by creating queries using multiple selection criteria; and > produce reports by setting up menus or short cuts. <p>They will also be able to design, create and interrogate multiple-table relational databases.</p> <p>Database tools, functions and techniques will be described as 'advanced' because:</p> <ul style="list-style-type: none"> > the software tools and functions involved will be complex and at times require new learning, which will involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying; and > the input, manipulation and output techniques involved will be complex, which will involve research, identification and application.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	45

Title	Improving productivity using IT	
CfA Unit No.		
WBA Unit No.	L/502/4157	
Level	3	
Credit Value	5	
GLH	40	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1 Plan, select and use appropriate IT systems and software for different purposes	1.1 Explain the purpose for using IT 1.2 Analyse the methods, skills and resources required to complete the task successfully 1.3 Analyse any factors that may affect the task 1.4 Critically compare alternative methods to produce the intended outcome 1.5 Develop plans for using IT for different tasks and purposes, including contingencies 1.6 Select and use appropriate IT systems and software applications to produce effective outcomes 1.7 Explain why different software applications could be chosen to suit different tasks, purposes and outcomes 1.8 Explain any legal or local guidelines or constraints which apply to the task or activity	
2 Evaluate the selection and use of IT tools to make sure that activities are successful	2.1 Critically compare the strengths and weaknesses of own and other people's final work 2.2 Review ongoing use of IT tools and techniques and change the approach as needed 2.3 Evaluate and test solutions to make sure they match requirements and are fit for purpose 2.4 Be prepared to give feedback on other people's selection and use of IT tools 2.5 Explain different ways to make further improvements to work	
3 Devise solutions to improve the use of IT	3.1 Evaluate the productivity and efficiency	

tools and systems for self and others	<p>of IT systems and procedures used by self and others</p> <p>3.2 Research and advise on ways to improve productivity and efficiency</p> <p>3.3 Develop solutions that make a demonstrable improvement to the use of IT tools and systems</p> <p>3.4 Test solutions to make sure that they work as intended</p> <p>3.5 Recommend improvements to IT systems and procedures that increase productivity</p>
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Additional Information about the unit	
Unit purpose and aim(s)	<p>The use of IT tools and systems can improve the productivity and efficiency of activities in a variety of contexts. This unit is about the skills and knowledge needed by the IT User to plan and review their use of predefined or commonly used IT tools for activities that are at times non-routine or unfamiliar. As a result of reviewing their work, they will be able to identify and use automated methods or alternative ways of working to improve productivity</p> <p>An activity will typically be 'complex and non-routine' because:</p> <ul style="list-style-type: none"> > the task or context is likely to require research, analysis and interpretation; > the work may be undertaken by others; and > the techniques required will be complex, and the selection process may involve analysis, research, identification and application.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Qualification Structures and Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	40

Title	IT security for users	
CfA Unit No.		
WBA Unit No.	D/502/4258	
Level	3	
Credit Value	3	
GLH	20	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Select, use and develop appropriate procedures to monitor and minimise security risk to IT systems and data	1.1 Evaluate the security issues that may threaten system performance 1.2 Select, use and evaluate a range of security precautions to protect IT systems and monitor security 1.3 Evaluate the threats to system and information security and integrity 1.4 Manage access to information sources securely to maintain confidentiality, integrity and availability of information 1.5 Explain why and how to minimise security risks to hardware, software and data for different users 1.6 Apply, maintain and develop guidelines and procedures for the secure use of IT 1.7 Select and use effective backup and archiving procedures for systems and data	

Additional Information about the unit	
Unit purpose and aim(s)	This is the ability to protect hardware, software and the data within an IT system against theft, malfunction and unauthorised access. This unit is about the skills and knowledge needed by the IT User to monitor potential risks and take steps to protect own and others' systems, data and software (eg from unauthorised remote access, disaster recovery or contingency planning).
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting	e-skills

the unit	
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	20

Title	Presentation software	
CfA Unit No.		
WBA Unit No.	T/502/4623	
Level	3	
Credit Value	6	
GLH	45	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Input and combine text and other information within presentation slides	1.1 Explain what types of information are required for the presentation 1.2 Enter text and other information using layouts appropriate to type of information 1.3 Insert charts and tables and link to source data 1.4 Insert images, video or sound to enhance the presentation 1.5 Identify any constraints which may affect the presentation 1.6 Organise and combine information for presentations in line with any constraints 1.7 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available	
2. Use presentation software tools to structure, edit and format presentations	2.1 Explain when and how to use and change slide structure and themes to enhance presentations 2.2 Create, amend and use appropriate templates and themes for slides 2.3 Explain how interactive and presentation effects can be used to aid meaning or impact 2.4 Select and use appropriate techniques to edit and format presentations to meet needs 2.5 Create and use interactive elements to enhance presentations 2.6 Select and use animation and transition techniques appropriately to enhance presentations	
3. Prepare interactive slideshow for	3.1 Explain how to present slides to	

presentation	<p>communicate effectively for different contexts</p> <p>3.2 Prepare interactive slideshow and associated products for presentation</p> <p>3.3 Check presentation meets needs, using IT tools and making corrections as necessary</p> <p>3.4 Evaluate presentations, identify any quality problems and discuss how to respond to them</p> <p>3.5 Respond appropriately to quality problems to ensure that presentations meet needs and are fit for purpose</p>
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Additional Information about the unit	
Unit purpose and aim(s)	<p>This is the ability to use software applications to produce effective presentations, which include a combination of media (eg images, animation and sound) for education, entertainment or information sharing.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use a wide range of advanced presentation software tools and techniques effectively to produce presentations that are complex or non-routine.</p> <p>Presentation tools and techniques will be described as 'advanced' because:</p> <ul style="list-style-type: none"> > the software tools and functions used will be complex and at times require new learning, which will involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying; > the inputting, manipulating and outputting techniques will be complex, and will involve research, identification and application; and > the user will take full responsibility for inputting, structuring, editing and presenting the information.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009

Unit guided learning hours	45
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Title	Set up an IT system	
CfA Unit No.		
WBA Unit No.	R/502/4211	
Level	3	
Credit Value	5	
GLH	40	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Select and connect up a personal computer safely with associated hardware and storage media to meet needs	1.1 Explain the reasons for choosing different system components and how to avoid any compatibility issues between hardware and software 1.2 Explain any health and safety issues associated with setting up an IT system 1.3 Explain the characteristics of IT systems that affect performance 1.4 Select and connect up the components of an IT system safely, including any peripheral devices and storage media	
2. Select and connect IT system to a communication service successfully to meet needs	2.1 Explain the reasons for choosing a communication service 2.2 Explain what effect variations in data transmission speed may have 2.3 Select and connect communication hardware safely to an IT system 2.4 Select and connect to a communication service from an IT system 2.5 Explain the factors which influence choice of Internet Service Providers	
3. Install and configure operating system and application software for use	3.1 Configure the user interface to meet needs 3.2 Explain what security precautions need to be addressed for the system to be used securely online by several users 3.3 Install, set up and configure virus protection and other security systems and software 3.4 Explain the benefits and risks of using disk partitions or other backup locations 3.5 Establish a backup routine for data and system	

	3.6 Install, set up and configure application software to meet needs
4. Check that the IT system and communication service are working successfully	<p>4.1 Explain what system tests and communication tests are needed and why</p> <p>4.2 Select and run suitable tests to make sure that the system and communication service are working successfully</p> <p>4.3 Explain the range of help and troubleshooting facilities available to solve problems</p> <p>4.4 Establish procedures for recovery in the event of system faults or failure</p> <p>4.5 Respond to faults and error messages and use help and troubleshooting facilities to determine and take appropriate action</p>

Additional Information about the unit

Unit purpose and aim(s)	<p>This is the ability to safely set up the components of an IT system (eg personal computer - PC, keyboard, mouse and printer), removable storage media (eg data stick or external DVD drive), communication service to access the Internet and associated software and check that they are working properly.</p> <p>This unit is about the skills and knowledge to select and connect up an IT system with a range of hardware, removable storage media and a communication service safely and successfully and to help others to do so.</p>
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	40

Title	Spreadsheet software	
CfA Unit No.		
WBA Unit No.	J/502/4626	
Level	3	
Credit Value	6	
GLH	45	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Use a spreadsheet to enter, edit and organise numerical and other data	1.1 Identify what numerical and other information is needed in the spreadsheet and how it should be structured 1.2 Enter and edit numerical and other data accurately 1.3 Combine and link data from different sources 1.4 Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available	
2. Select and use appropriate formulas and data analysis tools and techniques to meet requirements	2.1 Explain what methods can be used to summarise, analyse and interpret spreadsheet data and when to use them 2.2 Select and use a wide range of appropriate functions and formulas to meet calculation requirements 2.3 Select and use a range of tools and techniques to analyse and interpret data to meet requirements 2.4 Select and use forecasting tools and techniques	
3. Use tools and techniques to present, and format and publish spreadsheet information	3.1 Explain how to present and format spreadsheet information effectively to meet needs 3.2 Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets effectively 3.3 Select and use appropriate tools and techniques to generate, develop and format charts and graphs 3.4 Select and use appropriate page layout to present, print and publish	

	<p>spreadsheet information</p> <p>3.5 Explain how to find and sort out any errors in formulas</p> <p>3.6 Check spreadsheet information meets needs, using IT tools and making corrections as necessary</p> <p>3.7 Use auditing tools to identify and respond appropriately to any problems with spreadsheets</p>
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Additional Information about the unit	
Unit purpose and aim(s)	<p>This is the ability to use a software application designed to record data in rows and columns, perform calculations with numerical data and present information using charts and graphs.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use a wide range of advanced spreadsheet software tools and techniques to produce, present and check complex and non-routine spreadsheets.</p> <p>Spreadsheet software tools and techniques will be described as 'advanced' because:</p> <ul style="list-style-type: none"> > the range of data entry, manipulation and outputting techniques will be complex and non-routine; > the tools, formulas and functions needed to analyse and interpret the required information require complex and non-routine knowledge and understanding (for example, data restrictions, data validation using formula, pivot tables, data maps); and > the user will take full responsibility for setting up and developing the functionality of the spreadsheet.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	45

Title	Using collaborative technologies	
CfA Unit No.		
WBA Unit No.	T/502/4380	
Level	3	
Credit Value	6	
GLH	45	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Stay safe and secure when with collaborative technology	1.1 Explain what and why guidelines need to be established for working with collaborative technology 1.2 Develop and implement guidelines for good practice in working with collaborative technology 1.3 Explain how to establish an identity or present information that will promote trust 1.4 Develop and implement guidelines for checking the authenticity of identities and different types of information 1.5 Analyse and plan for the risks in the use of collaborative technologies for different tasks 1.6 Analyse and manage risks in the use of collaborative technologies	
2. Plan and set up IT tools and devices for collaborative working	2.1 Explain the features, benefits and limitations of different collaborative IT tools and devices for work purposes and tasks 2.2 Determine the IT tools and processes needed for archiving the outcomes of collaborative working 2.3 Summarise ways to integrate different collaborative technology tools and devices for a range of purposes, tasks and communication media 2.4 Explain potential access and compatibility issues with integrating different collaborative technology tools and devices 2.5 Select, connect and configure combinations that exploit the capabilities and potential of	

	<p>collaborative tools and devices</p> <p>2.6 Resolve access and compatibility problems so that different collaborative tools and devices work successfully</p>
3. Prepare collaborative technologies for use	<p>3.1 Evaluate data management principles, issues and methods</p> <p>3.2 Manage levels of access and permissions for different purposes</p> <p>3.3 Select and integrate different elements across applications to create environments for collaborative technologies</p> <p>3.4 Set and adjust settings to facilitate use of collaborative technologies by others</p> <p>3.5 Manage data flow to benefit collaborative working</p>
4. Manage tasks using collaborative technologies	<p>4.1 Determine levels of responsibility for the use of collaborative technologies</p> <p>4.2 Facilitate others' responsible contributions to and engagement with collaborative technologies</p> <p>4.3 Manage the moderation of collaborative technologies</p> <p>4.4 Oversee the archiving of the outcomes of collaborative working</p> <p>4.5 Explain what problems can occur with collaborative technologies</p> <p>4.6 Respond to problems with collaborative technologies and be prepared to help others to do so</p>

Additional Information about the unit

Unit purpose and aim(s)	<p>This is the ability to use IT tools and devices for collaborative working and communications, such as web or video conferencing, instant messaging/chat, online phone and video calls; online forums, social networking sites, wikis and other centralised depositories for documents, blogging, RSS and data feeds, bulk SMS or online work management tools.</p> <p>This unit is about the skills and knowledge to manage and effectively integrate and facilitate the safe use of multiple IT tools and devices so that groups can work collaboratively and effectively by:</p> <ul style="list-style-type: none"> > setting and implementing guidelines for using collaborative technologies; > integrating IT tools and devices and creating environments to exploit their
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	potential; > managing risks, permissions and data flow; and > moderating and solving complex problems with the use of collaborative technologies
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	45

Title	Website software	
CfA Unit No.		
WBA Unit No.	Y/502/4632	
Level	3	
Credit Value	5	
GLH	40	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Create structures and styles and use them to produce websites	1.1 Determine what website content and layout will be needed for each page and for the site 1.2 Plan and create web page templates to layout content 1.3 Select and use website features and structures to enhance website navigation and functionality 1.4 Create, select and use styles to enhance website consistency and readability 1.5 Provide guidance on laws, guidelines and constraints that affect the content and use of websites 1.6 Explain what access issues may need to be taken into account 1.7 Explain when and why to use different file types for saving content 1.8 Store and retrieve files effectively, in line with local guidelines and conventions where available	
2. Select and use website software tools and features to develop multiple page websites with multimedia and interactive features	2.1 Prepare content for web pages so that it is ready for editing and formatting 2.2 Organise and combine information needed for web pages in line with any copyright constraints, including across different software 2.3 Select and use appropriate editing and formatting techniques to aid meaning 2.4 Select and use appropriate programming and development techniques to add features and enhance websites 2.5 Select and use file formats that make information easier to download	

	2.6 Check web pages meet needs, using IT tools and making corrections as necessary
3. Publish and test multiple page websites with multimedia and interactive features	<p>3.1 Select and use appropriate testing methods to check that all elements and features of complex websites are working as planned</p> <p>3.2 Identify any quality problems with websites and explain how to respond to them</p> <p>3.3 Select and use an appropriate programme to upload and publish the website and make sure that it will download efficiently</p> <p>3.4 Respond appropriately to quality problems with websites to ensure outcomes are fit for purpose</p>

Additional Information about the unit	
Unit purpose and aim(s)	<p>This is the ability to use a software application designed for planning, designing and building websites.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use a range of advanced website software tools and techniques to develop multiple-page websites with multimedia and interactive features.</p> <p>Website software techniques will be described as 'advanced' because:</p> <ul style="list-style-type: none"> > the software tools and functions used will be complex and at times involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying; > the development techniques will be complex, and will involve research, identification and application; and > the user will take full responsibility for planning and developing the structure, inputting, manipulating, adding multimedia or interactive features, uploading and publishing the information.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills

Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	40

Title	Word processing software	
CfA Unit No.		
WBA Unit No.	Y/502/4629	
Level	3	
Credit Value	6	
GLH	45	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Enter and combine text and other information accurately within word processing documents	1.1 Summarise what types of information are needed for the document and how they should be linked or integrated 1.2 Use appropriate techniques to enter text and other types of information accurately and efficiently 1.3 Create, use and modify appropriate templates for different types of documents 1.4 Explain how to combine and merge information from other software or multiple documents 1.5 Combine and merge information within a document from a range of sources 1.6 Store and retrieve document and associated files effectively, in line with local guidelines and conventions where available 1.7 Select and use tools and techniques to work with multiple documents or users 1.8 Customise interface to meet needs	
2. Create and modify appropriate layouts, structures and styles for word processing documents	2.1 Analyse and explain the requirements for structure and style 2.2 Create, use and modify columns, tables and forms to organise information 2.3 Define and modify styles for document elements 2.4 Select and use tools and techniques to organise and structure long documents	
3. Use word processing software tools and techniques to format and present documents effectively to meet requirements	3.1 Explain how the information should be formatted to aid meaning 3.2 Select and use appropriate techniques to format characters and paragraphs 3.3 Select and use appropriate page and	

	<p>section layouts to present and print multi-page and multi-section documents</p> <p>3.4 Check documents meet needs, using IT tools and making corrections as necessary</p> <p>3.5 Evaluate the quality of the documents produced to ensure they are fit for purpose</p> <p>3.6 Respond appropriately to any quality problems with documents to ensure that outcomes meet needs and are fit for purpose</p>
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Additional Information about the unit	
Unit purpose and aim(s)	<p>This is the ability to use a software application designed for the creation, editing and production of largely text-based documents.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use a range of advanced word processing software tools and techniques to produce complex and non-routine documents.</p> <p>Word processing tools and techniques will be described as 'advanced' because:</p> <ul style="list-style-type: none"> > the software tools and functions will be complex and at times require new learning, which will involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying; > the techniques required will be complex, and the process of selecting appropriate techniques may involve research, identification and application; and > the user will take full responsibility for the inputting, manipulating and outputting of the information.
Unit expiry date	31/12/2013
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	See IT User Assessment Strategy available from www.e-skills.com
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	e-skills
Availability for use	
Unit available from	01/03/2009
Unit guided learning hours	45

Leadership and Management

Title	Manage physical resources	
CfA Unit No.		
WBA Unit No.	K/600/9711	
Level	4	
Credit Value	3	
GLH	25	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the importance of sustainability when using physical resources.	1.1 Explain the importance of using sustainable resources. 1.2 Explain the potential impact of resource use on the environment. 1.3 Explain how to use resources effectively and efficiently. 1.4 Describe actions one can take to minimise any adverse environmental impact of using physical resources.	
2. Be able to identify resource requirements for own area of responsibility.	2.1 Consult with colleagues to identify their planned activities and corresponding resource needs. 2.2 Evaluate past resource use to inform expected future demand. 2.3 Identify resource requirements for own area of responsibility.	
3. Be able to obtain required resources for own area of responsibility.	3.1 Submit a business case to procure required resources. 3.2 Review and agree required resources with relevant individuals. 3.3 Explain an organisation's processes for procuring agreed resources.	
4. Be able to monitor and review the quality and usage of resources in own area of responsibility.	4.1 Monitor the quality of resources against required specifications. 4.2 Identify differences between actual and planned use of resources and take corrective action. 4.3 Analyse the effectiveness and efficiency of resource use in own	

	<p>area of responsibility.</p> <p>4.4 Make recommendations to improve the effectiveness and efficiency of resource use.</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit will ensure that learners are able to identify, obtain, manage and review the use of physical resources. The unit also ensures learners are able to take the environmental impact of resource use into consideration.
Unit expiry date	28/02/2015
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Management Standards Centre – MSC Assessment Strategy for Management and Leadership Scottish Vocational Qualifications (SVQs) and National Vocational Qualifications (QCF) and Units
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	MSC - Management Standards Centre (USO & RoC)
Availability for use	Shared
Unit available from	01/01/2010
Unit guided learning hours	25

Title	Manage the environmental impact of work activities	
CfA Unit No.		
WBA Unit No.	M/600/9712	
Level	4	
Credit Value	5	
GLH	10	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the legal requirements and environmental policies that impact on own area of responsibility.	1.1 Explain the legal requirements that impact on own area of responsibility. 1.2 Explain the environmental policies that impact on own area of responsibility.	
2. Understand how to assess the impact of work activities on the environment and how this can be minimised.	2.1 Explain what specialist advice is available to manage the environmental impact of work activities. 2.2 Explain how to assess the impact of work activities and resources on the environment. 2.3 Explain how to minimise the environmental impact of work activities.	
3. Be able to assess and report on the environmental impact of work activities in own area of responsibility.	3.1 Assess the environmental impact of work activities and resource use. 3.2 Produce a report on the environmental impact of work activities and resource use, with recommendations for improvement.	
4. Be able to organise work activities and resource use to minimise environmental impact.	4.1 Adapt the use of resources in own area of responsibility to reduce environmental impact. 4.2 Organise activities in own area of responsibility to reduce environmental impact.	
5. Be able to promote ongoing improvement in environmental performance.	5.1 Establish means by which individuals can identify and report opportunities for improving environmental performance. 5.2 Communicate environmental	

	benefits resulting from changes to work activities.
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Additional Information about the unit	
Unit purpose and aim(s)	This unit will ensure that learners understand how to, and are able to, assess the environmental impact of their work and operate in such a way as to reduce the impact on the environment.
Unit expiry date	28/02/2015
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	MSC - Management Standards Centre (USO & RoC)
Availability for use	
Unit available from	01/01/2010
Unit guided learning hours	10

Title	Set objectives and provide support for team members	
CfA Unit No.		
WBA Unit No.	M/600/9600	
Level	3	
Credit Value	5	
GLH	35	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Be able to communicate a team's purpose and objectives to the team members.	1.1 Describe the purpose of a team. 1.2 Set team objectives with its members which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound). 1.3 Communicate the team's purpose and objectives to its members	
2. Be able to develop a plan with team members showing how team objectives will be met.	2.1 Discuss with team members how team objectives will be met. 2.2 Ensure team members to participate in the planning process and think creatively. 2.3 Develop plans to meet team objectives. 2.4 Set SMART personal work objectives with team members.	
3. Be able to support team members identifying opportunities and providing support.	3.1 Identify opportunities and difficulties faced by team members. 3.2 Discuss identified opportunities and difficulties with team members. 3.3 Provide advice and support to team members to overcome identified difficulties and challenges. 3.4 Provide advice and support to team members to make the most of identified opportunities.	
4. Be able to monitor and evaluate progress and recognise individual and team achievement.	4.1 Monitor and evaluate individual and team activities and progress. 4.2 Provide recognition when individual and team objectives have been achieved.	

Additional Information about the unit	
Unit purpose and aim(s)	This unit helps learners to set and support individuals and teams to achieve objectives.
Unit expiry date	28/02/2015
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	MSC - Management Standards Centre (USO & RoC)
Availability for use	
Unit available from	01/01/2010
Unit guided learning hours	35

Title	Provide leadership and direction for own area of responsibility	
CfA Unit No.		
WBA Unit No.	T/600/9601	
Level	4	
Credit Value	5	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Be able to lead in own area of responsibility.	1.1 Identify own strengths and ability to lead in a leadership role. 1.2 Evaluate strengths within own area of responsibility.	
2. Be able to provide direction and set objectives in own area of responsibility.	2.1 Outline direction for own area of responsibility. 2.2 Implement objectives with colleagues that align with those of the organisation.	
3. Be able to communicate the direction for own area of responsibility and collect feedback to inform improvement.	3.1 Communicate the agreed direction to individuals within own area of responsibility. 3.2 Collect feedback to inform improvement.	
4. Be able to assess own leadership performance.	4.1 Assess feedback on own leadership performance. 4.2 Evaluate own leadership performance.	

Additional Information about the unit	
Unit purpose and aim(s)	This unit helps learners to provide leadership and direction for their area of responsibility.
Unit expiry date	28/02/2015
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	MSC - Management Standards Centre (USO & RoC)
Availability for use	Shared
Unit available from	01/01/2010
Unit guided learning hours	30

Title	Support learning and development within own area of responsibility	
CfA Unit No.		
WBA Unit No.	M/600/9676	
Level	4	
Credit Value	5	
GLH	25	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Be able to identify the learning needs of colleagues in own area of responsibility.	1.1 Identify gaps between requirements of colleagues' current or future work roles and their existing knowledge, understanding and skills. 1.2 Prioritise learning needs of colleagues. 1.3 Produce personal development plans for colleagues in own area of responsibility.	
2. Understand how to develop a learning environment in own area of responsibility.	2.1 Explain the benefits of continual learning and development. 2.2 Explain how learning opportunities can be provided for own area of responsibility.	
3. Be able to support colleagues in learning and its application.	3.1 Identify information, advice and guidance to support learning. 3.2 Communicate to colleagues to take responsibility for their own learning. 3.3 Explain to colleagues how to gain access to learning resources. 3.4 Support colleagues to practise and reflect on what they have learned.	
4. Be able to evaluate learning outcomes and future learning and development of colleagues.	4.1 Examine with each colleague, whether the learning activities undertaken have achieved the desired outcomes. 4.2 Support colleagues when updating their personal development plan.	

Additional Information about the unit

Unit purpose and aim(s)	This unit helps learners to understand the importance of learning and to develop a learning environment within own area of responsibility.
Unit expiry date	28/02/2015
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	MSC - Management Standards Centre (USO & RoC)
Availability for use	Shared
Unit available from	01/01/2010
Unit guided learning hours	25

Title	Develop working relationships with colleagues and stake holders	
CfA Unit No.		
WBA Unit No.	K/600/9661	
Level	4	
Credit Value	4	
GLH	20	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Know how to identify stakeholders and their relevance to an organisation.	1.1 Identify an organisation's stakeholders. 1.2 Evaluate the roles, responsibilities, interests and concerns of stakeholders. 1.3 Assess the importance of identified stakeholders.	
2. Understand how to establish working relationships with colleagues and stakeholders.	2.1 Clarify how to agree a common sense of purpose with colleagues and stakeholders. 2.2 Summarise how to create an environment of trust and mutual respect with colleagues and stakeholders.	
3. Be able to create an environment of trust and mutual respect with colleagues and stakeholders.	3.1 Review and revise the needs and motivations of colleagues and stakeholders. 3.2 Demonstrate interaction with colleagues and stakeholders that allows respect for the views and actions of others.	

Additional Information about the unit	
Unit purpose and aim(s)	This unit will help learners to develop effective working relationships with colleagues and stakeholders.
Unit expiry date	K/600/9661
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	MSC - Management Standards Centre (USO & RoC)

Availability for use	Shared
Unit available from	01/01/2010
Unit guided learning hours	20